



HR Vendor Management & Procurement Checklist 2026

Pre-Procurement Needs Assessment

Defining the business requirement, scope of services, and internal budget availability for the new HR vendor.

Project Name

Business Requirement Overview

Estimated Budget Allocation

Required Service Categories

- ☐ Payroll Processing
- ☐ Recruitment/ATS
- ☐ Benefits Administration
- ☐ Learning Management System (LMS)
- ☐ Employee Engagement Tools
- ☐ Background Screening

Target Implementation Deadline

Enter date...

Internal Stakeholder Approval Document

 Upload File

Vendor Identification & Sourcing

Researching potential HR service providers, analyzing market alternatives, and managing the Request for Proposal (RFP) process.

Service Requirement Summary

Write something...

Vendor Longlist Criteria

Write something...

Sourcing Channels Used

- ☐ Industry Trade Shows
- ☐ Referrals/Networking
- ☐ Online Marketplaces
- ☐ Direct Outreach
- ☐ RFP Competitions

RFP Release Date

Enter date...

Estimated Budget Cap

Enter a number...

Initial Vendor Comparison Matrix

 Upload File

Vendor Evaluation & Selection

Comparing vendor capabilities, reviewing case studies, assessing technical compatibility, and conducting stakeholder interviews.

Vendor Name

Write something...

Summary of Vendor Capabilities

Write something...

Service Categories Provided

- ☐ Payroll Processing
- ☐ Recruitment/ATS
- ☐ Benefits Administration
- ☐ LMS/Learning Management
- ☐ Background Screening

Estimated Annual Cost (USD)

Enter a number...

Vendor Rating (1-5)

- ☐ 1 - Poor
- ☐ 2 - Below Average
- ☐ 3 - Average
- ☐ 4 - Good
- ☐ 5 - Excellent

Vendor Proposal/RFP Response

 Upload File

Evaluation Completion Date

Compliance & Risk Due Diligence

Reviewing vendor security protocols, data privacy compliance (GDPR/CCPA), insurance coverage, and regulatory alignment.

Compliance Certifications Verified

- ☐ SOC2 Type II
- ☐ ISO 27001
- ☐ GDPR/CCPA Compliance
- ☐ HIPAA Compliance
- ☐ Cyber Essentials

Certificate of Insurance (COI)

 Upload File

Data Processing Agreement (DPA) Status

- ☐ Signed & Executed
- ☐ Under Legal Review
- ☐ Pending Vendor Signature
- ☐ Not Required

Last Security Audit Date

Risk Mitigation Summary

Write something...

Compliance Officer Approval

Contract Negotiation & Legal Review

Finalizing Service Level Agreements (SLAs), reviewing pricing structures, and securing legal approval on terms and conditions.

Contract Effective Date

Enter date...

Contract Expiration Date

Enter date...

Contract Type

- ☐ Software as a Service (SaaS)
- ☐ Professional Services
- ☐ Staffing/Recruitment Agency
- ☐ Benefits/Insurance Provider

Legal Review Checklist Completed

- ☐ Data Processing Agreement (DPA) Signed
- ☐ Liability Clauses Reviewed
- ☐ Termination Clause Verified
- ☐ Indemnity Terms Approved
- ☐ SLA Terms Confirmed

Negotiation Summary & Key Deviations

Write something...

Final Signed Contract Document

 Upload File

Legal Counsel Approval Signature

Implementation & Integration Planning

Coordinating software integration with existing HRIS, setting up user access, and defining the data migration strategy.

Target Implementation Go-Live Date

Enter date...

Integration Project Lead Name

Write something...

Systems Requiring Integration

- ☐ HRIS/HRMS
- ☐ Payroll System
- ☐ Applicant Tracking System (ATS)
- ☐ Learning Management System (LMS)
- ☐ Time & Attendance Software

Data Migration & Mapping Strategy

Write something...

Technical Integration Documentation

 Upload File

Implementation Complexity Level

- ☐ Low (Plug-and-Play)
- ☐ Medium (Requires Configuration)
- ☐ High (Custom API/Development Required)

Onboarding & Training

Conducting training sessions for HR administrators and end-users, and establishing internal support workflows.

Training Completion Date

Enter date...

Training Modules Completed

- ☐ HRIS System Navigation
- ☐ Data Privacy & Compliance Training
- ☐ Vendor Portal Management
- ☐ Reporting & Analytics Dashboard
- ☐ Incident Reporting Workflow

Assigned Trainer Name

Write something...

Training Attendance Log/Certificate

 Upload File

Training Delivery Method

- ☐ In-Person Workshop
- ☐ Virtual Webinar
- ☐ Self-Paced E-Learning
- ☐ On-the-Job Shadowing

Administrator Acknowledgment

Performance Monitoring & Audit

Establishing KPIs for vendor performance, scheduling periodic service audits, and reviewing quarterly SLA compliance.

Last Audit Date

Vendor Performance Rating

- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement
- ☐ Unsatisfactory

Number of SLA Breaches Detected

Key Performance Indicators (KPIs) Reviewed

- ☐ Service Uptime/Availability
- ☐ Response Time Accuracy
- ☐ Data Security Compliance
- ☐ Customer Support Quality
- ☐ Cost Management/Budget Adherence

Audit Findings & Corrective Action Plan

Write something...

Upload Audit Report or Evidence

 Upload File

HR Manager Verification

Contract Renewal or Termination Protocol

Managing the end-of-term review process, evaluating renewal options, or executing the offboarding/data retrieval plan.

Contract Expiration Date

Enter date...

Renewal Action Plan

- ☐ Renew Contract
- ☐ Re-negotiate Terms
- ☐ Terminate Contract
- ☐ Issue New RFP

Reason for Termination or Renewal Decision

Write something...

Post-Termination Offboarding Tasks

- ☐ Revoke System Access
- ☐ Retrieve Company Data/Assets
- ☐ Final Payment Processing
- ☐ Update Internal Vendor Registry

Signed Amendment or Termination Notice

 Upload File

Procurement Manager Approval

< Previous

> Next

✔ Finish

 **Generate Sample Report**