ACACIA HR solutions

HR Tech Buyer's Checklist for Small Employers

Make smarter HR tech decisions with limited time and budget.

When you're managing HR in a small business, software shouldn't add stress, it should reduce it. But with so many options (and so much jargon), it can be hard to know where to start. This checklist will walk you through what to think about before you book a demo, how to get the most from your conversations with vendors, and how to prep for a smooth implementation once you choose a system.

Step 1: Separate Your Needs from Your Wants

Before you even open a demo calendar, sit down and think through your actual HR process.
Ask yourself:

- **Where am I losing the most time?**
- **What's manual that really shouldn't be?**
- **Where are mistakes happening?**
- **What's confusing for employees or new hires?**

Now, create three columns:

Must-Haves	Nice-to-Haves	Deal-Breakers
What your system *must* do to make life easier (e.g., payroll + time tracking)	Features that would be great, but not critical (e.g., built-in org chart)	Anything that makes the system unusable (e.g., no ACA support, bad customer service)

Tip:

Be ruthless. A sleek UI is nice, but reliable tax filings matter more.

Step 2: Prep for the Demo (Don't Wing It)

Going into a demo without a plan is like going grocery shopping hungry; you'll end up with things you don't need. Here's how to prep:

- **Have your must-have / nice-to-have / deal-breaker list in front of you**
- **Know your approximate employee count today and 12 months from now**
- **Be ready to describe your current process from hiring to offboarding**
- **Jot down a few workflows you'd like to improve (e.g., onboarding, leave tracking)**

Step 3: Questions to Ask During the Demo

Don't just sit back and watch a rehearsed click-through. Ask real, scenario-based questions that reflect your day-to-day.
Here are some to bring with you:

About functionality:
- How do you handle onboarding for remote employees?
- Can employees update their own info, like addresses or tax forms?
- Is time off tracking customizable for different leave types?

About integrations and scalability:
- Does this system integrate with my current payroll or accounting software?
- What happens if we double in size next year? Will this scale with us?

About support and setup:
- What does implementation look like?
- Will I have a dedicated support contact?
- What does ongoing support include (chat, email, phone, turnaround time)?

About pricing:
- What's included in the base price? What's an add-on?
- Are there setup or training fees?

Tip:

Ask to see how a task is done, not just that it can be done. Example: "Can you show me how to run a termination in the system?"

Step 4: Preparing for Implementation

Once you've signed the contract, don't wait for the vendor to take the lead. You'll want to:

- Assign one internal point person to drive setup (maybe it's you!)
- Set realistic timelines—implementation can take 4–12 weeks, depending on complexity
- Gather key documents (employee rosters, current policies, pay schedules, etc.)
- Communicate early with employees, especially if their experience is going to change

Ask your vendor for:

- A detailed implementation checklist
- Milestones and timelines

Training options (for you and your employees)

FINAL THOUGHT

You don't need perfect software. You need the right fit for your business—something that does most things well enough without overwhelming you or your employees. Keep it simple. Keep it scalable. And remember: tech should support your process, not drive it.