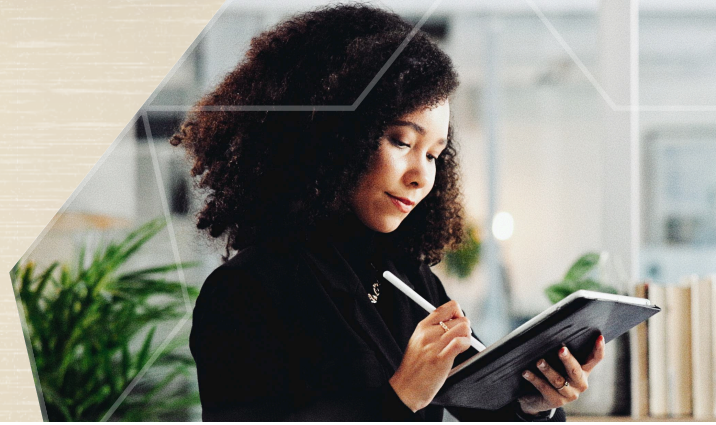


# Connected Platform Decision Checklist



You've read the [case for a unified talent platform](#). You've [compared a fragmented HR tech stack](#) to the platform model. This checklist is the last step: a structured way to confirm you're ready to greenlight a connected platform — and a clear, criteria-based rationale for moving forward to share with leadership.

## How to use this checklist

Work through each section with your HR leadership team. Check **Yes** in the **Confirmed** column for the criteria your current state or shortlisted platform already meets. Check **Not yet** in the **Needs Work** column for anything that still requires action.

**Who should be in the room:** CHRO or VP of HR, HR Ops Lead, Talent Acquisition Lead, IT/Security Representative, Finance or Procurement

**Output:** A completed checklist you can attach to your approval memo and use as the basis for a demo conversation.

## Section 1: The Problem Is Real Enough To Act On

Confirm that fragmentation is creating measurable business drag, not just operational frustration.

Evaluation Criteria	Confirmed	Needs Work
We can manage the full talent lifecycle — recruiting, onboarding, performance, and learning — without switching between 3 or more disconnected platforms.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
Our systems share data without manual exports or re-entry, and information flows automatically between tools.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We've been able to execute talent initiatives on time without being blocked by inaccessible or unreliable data.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
HR leadership trusts our reporting without requiring manual reconciliation before sharing it.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
Integration failures or API breaks have not disrupted a key workflow in the past 6 months.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
Our talent data is connected enough to make AI tools reliable and actionable.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet

## Section 2: The Business Case Is Clear

Verify that a platform investment is tied to outcomes the business already cares about.

Evaluation Criteria	Confirmed	Needs Work
We can connect platform consolidation directly to a top HR or business priority (faster hiring, better retention, AI enablement, or talent planning).	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We can define what success looks like in measurable terms at 90 days, 6 months, and 12 months.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
Leadership understands that fragmented data limits AI ROI, not just operational efficiency.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We know which workflows have the highest handoff count and the clearest consolidation opportunity.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
Our business case includes the total cost of ownership compared against current stack costs.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet

## Section 3: Your Data Foundation Is Ready (Or You Have a Plan)

A connected platform is only as valuable as the data it runs on. Know where you stand before you evaluate.

Evaluation Criteria	Confirmed	Needs Work
We have a clear picture of where talent data lives and where definitions or formats are inconsistent across systems.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We've identified which data gaps would limit AI accuracy and have a plan to resolve them.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
Data governance, permissions, and audit requirements are understood and can be clearly communicated to a vendor.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We know which AI use cases we want to enable in the next 12-24 months and can use them as an evaluation lens.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We have internal alignment that connected data is a prerequisite, not a phase 2, for AI deployment.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet

## Section 4: You're Evaluating Connection, Not Just Features

You don't just need to know what each talent platform *does* — you need to know how it *connects*.

Evaluation Criteria	Confirmed	Needs Work
We've asked vendors to show how a single data point (e.g., source of hire) flows through to onboarding outcomes and performance trends.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We've confirmed that AI tools in the platform inherit consistent permissions and governance across workflows.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We've assessed how the platform handles skills data across the full lifecycle, not just at the point of capture.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We've asked vendors how many integrations our top 5 workflows require and who owns break/fix.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We've confirmed the platform supports the workflows our teams actually use.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet

## Section 5: Your Organization Is Ready To Execute

Technology decisions fail when change management isn't taken seriously. Check your readiness.

Evaluation Criteria	Confirmed	Needs Work
HR, IT, and Finance are aligned on what success looks like, and each function has defined its role in implementation.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We have a plan for change management and adoption, as well as a deployment timeline.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
We've identified the highest-leverage integration to execute first: the one that will demonstrate ROI fastest.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
Data migration, cleanup, and training costs are accounted for in our timeline and budget.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet
Executive sponsors are engaged and understand this is a strategic program, not just a software implementation.	<input type="checkbox"/> Yes	<input type="checkbox"/> Not Yet

## How To Read Your Results

Mostly Confirmed	You're ready to move forward. Use this checklist as your internal greenlight memo and schedule a demo.
Several Needs Work	You have gaps worth addressing. Use this list to prioritize the highest-leverage fix before investing.
Mostly Needs Work	This is still a worthwhile direction, but start with a stack audit and a data governance plan before evaluating platforms.



See what a connected platform actually looks like with ClearCo.

[Book a demo](#)