

CHRO Evaluation Checklist: What To Look for in an Agile HR Platform



You already know you're dealing with HR systems that can't keep up. The harder question is which platform can actually deliver agility, data integrity, and AI readiness rather than another round of feature promises.

This checklist gives you a structured way to evaluate agile HR platforms against the criteria that matter most: integration depth, workflow coverage, AI governance, and organizational readiness. Work through each section with your leadership team so you walk into vendor conversations with a shared definition of what agility means for your organization.

Assess Your Current State Before You Shop

- ☐ Audit every system currently in use across recruiting, onboarding, performance, learning, and talent planning. Document where data lives and **where it breaks down**.
- ☐ Identify the top five workflows with the highest number of manual handoffs or data re-entry steps.
- ☐ Quantify what fragmentation is costing today, including time lost to reconciliation, reporting delays, and compliance exposure. Insight into even one area helps you make your case.
- ☐ Confirm whether your current stack can answer three questions without manual effort:
 - ☐ Where do your critical skills gaps sit?
 - ☐ Which employees are ready for internal mobility?
 - ☐ Which hiring sources produce your highest performers?
- ☐ Determine whether your talent data is complete and consistent enough to support AI-driven decisions reliably.

By this point, you should have a clear picture of where your data lives, where it breaks down, and what fragmentation is actually costing you, rather than just a vague sense that things are disconnected.

Define What Agile Actually Means for Your Organization

- ☐ Document three to five enterprise outcomes your talent strategy is accountable for, and tie each one to a specific workflow and a measurable KPI.
- ☐ Define what real-time workforce agility looks like in your context, whether that's faster restructuring, dynamic skills deployment, or accelerated internal mobility.
- ☐ Establish a KPI dictionary that HR, finance, and operations leadership agree on before vendor conversations begin.
- ☐ Identify which talent decisions currently require the most manual coordination and would benefit most from automation or AI assistance.
- ☐ Confirm that your definition of platform success includes cross-functional execution, not just HR operational efficiency.

You should now have a shared, KPI-backed definition of agility that HR, finance, and operations all agree on. That way, you're evaluating vendors against your standard instead of theirs.

Test Platform Architecture and Integration Depth

- ☐ Ask each vendor to demonstrate how a single data point, such as source of hire, flows through to onboarding outcomes, performance trends, and retention risk.
- ☐ Confirm how many integrations are required to support your top five workflows, and clarify who owns break/fix after implementation.
- ☐ Assess how the platform handles skills data across the full talent lifecycle, not just at the point of capture.
- ☐ Verify that AI capabilities are embedded in actual workflows rather than sold as add-on features layered on top of **disconnected data**.
- ☐ Confirm that AI tools within the platform inherit consistent permissions, audit trails, and governance across every module.
- ☐ Ask vendors to show a realistic 90-day implementation scope rather than a sales-deck timeline.

At this stage, you should be able to say exactly how data moves through a platform end to end, and which vendors can show that versus describe it.



Dig Deeper: Why Disconnected Recruiting Tools Create Risk

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Evaluate AI Governance and Data Readiness

- ☐ Confirm the platform maintains a single, continuously reconciled source of truth for core workforce data.
- ☐ Ask each vendor how they test for and mitigate algorithmic bias, and what they log when they do.
- ☐ Verify the platform can produce AI decision documentation on demand for compliance and audit purposes.
- ☐ Establish your organization's non-negotiable AI governance requirements, including human-in-the-loop approval points, bias testing thresholds, and audit log standards.
- ☐ Confirm that connected data and governance are treated as prerequisites for AI deployment, not a phase-two consideration.

You should leave this section with a documented list of your organization's non-negotiable governance requirements, ready to use as a pass/fail filter on your remaining vendors.

Validate Organizational Readiness To Execute

- ☐ Confirm that HR, IT, and finance are aligned on what platform success looks like, with each function holding a defined role in implementation.
- ☐ Identify the one or two workflows with the clearest, fastest ROI to anchor Wave 1, and avoid scoping too broadly.
- ☐ Verify that data migration, cleanup, and training costs are accounted for in your timeline and budget.
- ☐ Confirm executive sponsors understand this as a strategic program rather than a software swap.
- ☐ Build a change management and adoption plan before you finalize vendor selection, not after.

By the end of this section, you should have executive alignment, a scoped Wave 1, and a change management plan in place. If so, you're ready to select a vendor, not just start looking.

You're Ready to Shortlist — Here's How

With this checklist complete, you're equipped to move from a crowded vendor landscape to a confident shortlist. Convert your responses into a weighted scorecard that prioritizes integration maturity, AI governance transparency, and workflow coverage. Then schedule personalized demos tailored to your real workflows.

Treat any unchecked items in Assess Your Current State or AI Governance as blockers, not just items to note, because they're the foundation that effective AI agents depend on.

Ready to vet your finalists? [Download Agentic AI: Due Diligence Guide for the C-Suite.](#)

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