Gartner Research

Tool: Checklist to Review Your HR Technology Roadmap

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Initiatives: HR Technology Strategy, Transformation and Management

> HR technology leaders can use this checklist to review their HR technology roadmap biannually or when a review is triggered. The checklist provides a concise and structured approach to the necessary action steps involved in updating HR technology roadmaps.

When to Use

In 2023, 96% of HR technology leaders indicate their team has been receiving more requests for HR technology services, and 94% say requests are getting more complex. [1] To keep pace with changes in expectations for HR technology systems and solutions, over half of HR technology leaders are now attempting to update their HR technology roadmaps at least once a year. Given this shift, HR technology leaders require a consistent approach to measure progress and adjust their roadmap based on organizational needs or to prepare for external shocks that could impact HR and their business.

HR technology leaders can use this tool to establish a structured process to review and update their roadmap. Following the outlined steps in the Tool will help HR technology leaders refresh their roadmap to ensure it is still clearly aligned to business strategy and position the function for future successes.

Directions for Use

The checklist provides the following structure to prepare, act and outline next steps while reviewing the HR technology roadmap:

- Reassess business outcomes

- Refresh needs and gap analysis

- Review market scan and portfolio assessment

- Measure and replan

Aligned to this process, for support on how to implement any step, HR leaders can refer to How to Create an HR Technology Strategy and Roadmap and Ignition Guide to Building an HR Technology Roadmap or speak to a Gartner analyst.

Instructions

HR technology leaders can use this checklist to ensure execution of all necessary steps in reviewing their HR technology roadmap effectively and contextualizing it for their organization. Post review, HR technology leaders can note down summarized next steps to be taken.

The tool provides a structure and action steps to review the HR technology roadmap:

Prepare	• HR Technology Roadmap Review

Act	• Components of the Checklist
	   1. Reassess Business Outcomes (+Illustrative example)
	   2. Refresh Needs and Gap Analysis
	   3. Review Market Scan and Portfolio Assessment
	   4. Measure and Replan

Next Steps	• Next Steps: Action Items

Note: This tool is meant to provide guidance on your approach to reviewing an HR technology roadmap. Your HR technology strategy and roadmap can be refreshed either **recurringly** (annually/biannually/quarterly) or be **trigger-based,** i.e., when a major business or technology event happens (e.g., major business strategy change, M&A, impending end-of-vendor-support for a major technology, etc.).

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HR Technology Roadmap Review

Steps and Outcomes of the Technology Roadmap Review

Reassess Business Outcomes	Refresh Needs and Gap Analysis	Review Market Scan and Portfolio Assessment	Measure and Replan
• Identify any new stakeholders and business outcomes • Update timelines and guiding principles • Engage and get buy-in from any new stakeholders	• Assess current state and capture emerging requirements • Identify new personas or journeys added and updates to existing ones • Conduct gap analysis and reprioritize HR business capabilities	• Scan market landscape • Understand new vendors and specific vendor capabilities • Reassess HR technology portfolio options	• Measure value of the roadmap initiatives • List down new quick wins and high value initiatives • Conduct governance meeting with stakeholders to assess progress
Clarity on Destination	**Distinctive Gaps and Needs Identified**	**Best-Fit Technology Portfolio**	**Path for Transformation**

Note: This is an illustrative order. Your review and timelines can and should be customized to meet requirements and operations of your organization on a local and global level.

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Components of the Checklist

- **Key Activities:** List of activities for checking and ensuring successful execution of each of the five steps in the reviewing process of the HR technology roadmap.

- **Status Legends:**
  Green — reflects activity completion;
  Yellow — reflects progress made but not fully completed;
  Red — reflects no progress made.

- **Barriers to Completion:** Description of any roadblocks/challenges/limitations in place that is hindering completion of the activity. *This needs to be filled only in case of status being yellow or red.*

- **Action Steps:** For activity completion, a list of planned activities or interventions that need to take place and their respective timelines.

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Reassess Business Outcomes

Key Activities	Status	Barriers to Completion	Action Steps
Identify new stakeholders that are now significant to the roadmap implementation.*	*Complete*	*NA*	*NA*
Identify new business outcomes that are now critical to achieve for the HR technology vision through strategic interviews with stakeholders.*	*Complete*	*NA*	*NA*
Update vision, timelines and guiding principles based on stakeholder consultations.*	*Complete*	*NA*	*NA*
Engage new stakeholders identified to communicate expectations and gain buy-in for the roadmap.	*In Progress*	*Conflict in updating the budget of HR technology based on new outcomes, with the new finance leader.*	*Set up time for discussion with the finance leader and share updates/ new developments with them by [X] date.*
Create a template that can be used in every review to maintain consistency in communicating changes to stakeholders.	*In Progress*	*…*	*…*
Schedule open hours for stakeholders to share evolving questions and concerns and get clarity on the updated plan.	*Inactive*	*…*	*…*

*Activities marked with an asterisk should be considered essential.

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Refresh Needs and Gap Analysis

Instruction: Refer below for a checklist to identify any gaps or business requirements that have emerged or changed.

Key Activities	Status	Barriers to Completion	Action Steps
Assess the current state and capture emerging requirements. - For support, use the tool below to support the process of gathering business and user requirements, conducting vendor reviews and formulating proposal requests.* *Tool: RFI for HCM Technology Functional Requirements*	*In Progress*	*Current lack of prioritization from [X] business units.*	*Create a prioritized list of distinctive requirements to understand what's unique and/or critical versus nice-to-have by [X] date.*
Identify new personas and journeys as well as updates to existing ones by regularly listening to employees, managers, and other personas (e.g., through interviews, focus groups, and surveys).*			
Conduct a gap analysis to determine which of the prioritized HR business capability still has gaps in achieving the HR and talent imperatives.*			
Based on the analysis, reprioritize HR business capabilities (if required) for transformation.			
Develop a strategic plan to communicate the new priorities and changes to relevant stakeholders and get their buy-in.			

*Activities marked with an asterisk should be considered essential.

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Review Market Scan and Portfolio Assessment

Instruction: Refer below for a checklist to examine the internal and external state and the technology portfolio.

Key Activities	Status	Barriers to Completion	Action Steps
Scan the market to understand the vendor landscape, specific vendor capabilities and check if there are any new vendors that should be considered.*	*In Progress*	*We are currently considering too many technology vendors in the market for our short-list.*	*Make a list of relevant vendors, determine their strengths and weaknesses by [X] date.*
Reaffirm vendors under consideration and shortlist based on viability, maturity, relevance and roadmap fit.*			
Reassess the HR technology portfolio options to ensure fit with new strategic, functional, and technical needs.*			
Monitor the HR technology landscape continuously to keep abreast of new technology launches and peer reviews.			

*Activities marked with an asterisk should be considered essential.

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Measure and Replan

Instruction: Refer below for a checklist to measure the progress of the targeted plan.

Key Activities	Status	Barriers to Completion	Action Steps
Measure value of the roadmap initiatives based on: • ability to achieve the vision • alignment with the strategic guiding principles • impact on prioritized business outcomes • feedback from stakeholders • contribution towards meeting the distinctive requirements within high-priority HR business capabilities Compare these initiatives' value with what was estimated previously to understand extent of achievement.*	*In Progress*	*Time constraints to complete this step before the upcoming stakeholder governance meeting.*	*Identify root cause of expected outcomes deviations for critical roadmap initiatives by [X] date.*
List down new quick wins as well as long term initiatives that will produce high value with relatively low complexity and time.*			
Conduct a governance meeting with stakeholders to assess progress against the roadmap and the shifts made. These governance / steering committee meetings have a recommended cadence of quarterly, (or at least bi-annually), to get stakeholder feedback and identify triggers to refresh the roadmap.*			
Create a simple and easy-to-understand template to communicate roadmap's progress to business leaders.			
Discuss the progress with business leaders and get their inputs for agreement and further plan of action.			

*Activities marked with an asterisk should be considered essential.

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Next Steps: Action Items

Instruction: Refer below for a list of summarized action steps surfaced from the checklist.

Action Items	Timeline
(Example) ***Refresh Needs and Gap Analysis*** ***Assess the current state and capture emerging requirements:*** • *Create a prioritized list of distinctive requirements to understand what's unique and/or critical versus nice-to-have.*	*[X] Date*
(Example) ***Examine Best-Fit Future State*** ***Scan the market to understand the vendor landscape, specific vendor capabilities and potential future-state technology portfolio options that can be considered:*** • *Monitor the HR technology landscape to keep abreast of new technology launches, vendors and peer reviews.* • *Use outside-in perspectives such as insights from vendor briefings and demos, and conferences and tradeshows to understand the vendor landscape and specific vendor capabilities, new relevant vendors, compare their strengths and weaknesses.*	*[X] Date*

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Evidence

[1] **The 2023 Gartner HR Technology Survey** was conducted to understand various aspects of the state of the HR technology function. The survey asked about things like budget, team structure and program implementation. The first attempt of this survey was fielded in July 2022, with the second attempt launching in February 2023. The data from each are combined to achieve a total sample size of 48 HR technology leaders. The survey was designed and fielded by the HR Practice research team.

Recommended by the Authors

How to Create an HR Technology Strategy and Roadmap

Ignition Guide to Building an HR Technology Roadmap

HR Technology Planning Imperatives for 2023 and Beyond

Tool: HR Technology Strategy on a Page Template

2023 State of the HR Technology Function

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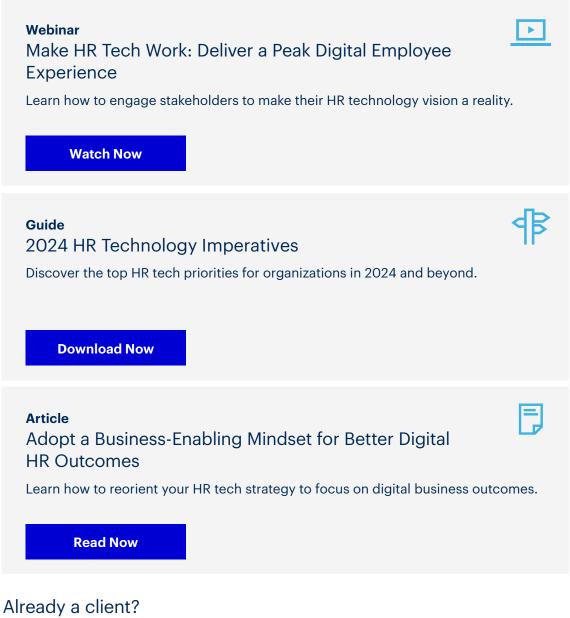
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