

TMS Requirements Checklist Template

Purpose:

This checklist helps HR leaders document, prioritize, and align on the essential features and requirements their organization needs in a Talent Management System (TMS). Use it during vendor shortlisting and internal stakeholder discussions.

Section 1: Business Goals

List the strategic goals the TMS should help achieve:

- Improve employee engagement
- Support remote/hybrid workforce
- Streamline performance reviews
- Align teams with company OKRs
- Enable leadership development
- Other: _____

Section 2: Must-Have Features

Mark features your team considers non-negotiable:

- Performance management
- OKR tracking & alignment
- 360-degree feedback
- Succession planning
- Continuous feedback
- Learning & development tools

- Talent analytics and insights
- Custom workflows
- Other: _____

Section 3: Integration Needs

What systems should the TMS connect with?

- Slack
- Microsoft Teams
- Jira
- Google Workspace
- Payroll software (e.g., ADP, Gusto)
- ATS (e.g., Greenhouse, Lever)
- HRIS (e.g., BambooHR, Workday)
- Other: _____

Section 4: Compliance & Security

Ensure the system meets your org's data standards:

- GDPR / CCPA compliance
- Data encryption in transit & at rest
- Role-based access controls
- Regular security updates
- Data residency (specify location): _____
- Other: _____

Section 5: Budget Range

Define your TMS investment parameters:

- Initial budget range: \$ _____
- Preferred pricing model:
 - Subscription (SaaS)
 - One-time license
 - Per-user pricing
 - Custom enterprise deal
- Additional costs to consider: implementation, training, support