

Request for Information & Proposal Questions: Employee onboarding software

Your company is ready to take its onboarding process to the next level with employee onboarding software – and you are faced with the daunting task of searching for a provider. We're here to help!

The list of questions on the following pages are designed to gain a well-rounded and complete picture of software solutions for employee onboarding.

Request for information (RFI) vs. Request for proposal (RFP)

If you're not exactly sure what the difference is between an RFI and an RFP, then chances are likely that you'll be following a relatively informal process to gather information about potential onboarding software solutions. In this case, the template we've provided is perfect for you and can be used as-is if you're strapped for time.

RFI → Request for general information about products and services.

RFP → Request for specific ways in which the vendor proposes to solve the company's needs.

Making this template work for you

You can revise it, use just a portion of it or send it out as-is.

To get the best information, we recommend providing a cover letter with the following information about your company and its onboarding needs:

- Your industry
- Number of employees and average number of new hires per year
- Current onboarding software, if any.
- Integration preferences
- Prevalence of remote workers
- Majority of new hire job positions (e.g., retail associates, etc.)
- Unique issues or circumstances

Our onboarding experts are available to help.

[Click here to book a time](#)



REQUEST FOR INFORMATION & PROPOSAL

EMPLOYEE ONBOARDING SOFTWARE

Company information

1. Who completed this RFP, and what are their contact details?
2. What's your company's full name, address, and phone number?
3. Where do you have offices?
4. Please give us a general summary of the product and services you offer.
5. Can we review your Terms & Conditions? (provide link or document)
6. What's your approach toward the future of onboarding?
7. Why do you do what you do. That is, what is your purpose and mission?

Your Product

8. Is your system cloud-based?
9. How is your system different than other similar solutions?
10. What are your pricing plans? How are they billed?
11. What pricing plan would you suggest for us?
12. What solutions/ software does your system integrate with?
13. Are there extra costs for us to use your integrations?
14. How would updates to your software affect us?
15. How do you plan to improve your product or services in the next year?

Onboarding effectiveness

16. Do you offer the ability for us to customize the verbiage on our platform?
17. What are your system's features for pre-boarding and onboarding?
18. How does your system help us structure our onboarding process?
19. How does your system help us communicate with new hires?
20. How does your system help us manage new hire documentation, training, and information requirements?
21. Are new hires reminded of trainings and notified of their progress?
22. Does your system support an automated checklist system?
23. Do you offer templates?
24. Is this a mobile friendly software system?
25. Are there additional costs related to customization?
26. Does your system allow for electronic signature capabilities?
27. How does your system help us survey new hires?
28. What reports and analytics does your system offer?
29. How would your system's reports help us improve our retention?
30. What does the employee portal look like from the new hire's perspective?
31. Does your system sync with new hires' calendars to add reminders?

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User experience

32. How can management check the status of their new employee's progress through the onboarding process?
33. How does your system track email communication with candidates?
34. Does your system allow for remote onboarding?
35. Can we have multiple new hires/users in the system simultaneously?
36. Are there provisions in your system for people with disabilities?
37. How do you encourage users to fully adopt your system?

Implementation and sustainability

38. What is your usual implementation procedure and who takes part in it?
39. How long does it typically take to fully implement your system?
40. What actions do you take to migrate data from existing systems?
41. What training do you provide during the implementation period?
42. Is there an extra cost for implementation/ training support?
43. What level of support services do you offer after implementation?
44. What training material or resources do you offer?
45. How and when could we reach your support services and what is the average response time?
46. How do you resolve issues (e.g. crashes, slow loading)?

Sustainability

47. How often do you upgrade / maintain your system?
48. How much downtime is expected when you're maintaining your system?
49. How do you notify users when you're upgrading / maintaining your system?
50. What training is provided when features are added, or changes made?
51. What actions do you take to prevent problems with your system?

Security and Data Protection

52. What security audits do you do, and how often?
53. Where is personal data of new hires and users stored?
54. How do you protect personal data from breaches, losses, etc.?
55. Who has access to the data we in the system?
56. Can we have different levels of access for team members?
57. How do you ensure your system complies with GDPR?
58. How does your system help us grant employee requests about accessing, rectifying, or deleting data?
59. How do you manage system crises (e.g. data breaches, data deletion)?

**Our onboarding experts can help customize your questions.
[Click here to book a time.](#)**