



WHITEPAPER

# HCM SYSTEM SELECTION IN HEALTHCARE



HR TECH CONSULTING FOR HEALTHCARE

System Selection | Implementation | Optimization | Maintenance & Ongoing Support

# ABOUT ROCKCREST

Since 2007, ROCKCREST has partnered with hundreds of healthcare organizations to select, implement, and optimize HR technology. Our clients include hospitals, hospital networks, physician groups, behavioral health organizations, rehabilitation facilities, and long-term care providers, many operating across multi-facility environments.

Our expertise includes HR system selection initiatives, managing RFP processes, and defining technology strategies aligned to workforce operations, regulatory requirements, and labor cost visibility. Our consultants bring deep health sector experience across the major enterprise and mid-market HR platforms used throughout the healthcare sector.

Our approach is grounded in a practical understanding of healthcare's regulatory and operational realities. In healthcare, HR systems must support far more than core HR processes. They must enable credential compliance, audit readiness, workforce oversight, and the labor cost visibility required to support effective workforce management.



## OUR EXPERTS SUPPORT

- 1 Medical & Surgical Hospitals
- 2 Multi-Site Physician Groups
- 3 Behavioral Health Organizations
- 4 Rehabilitation Facilities
- 5 Long-Term & Elder Care Providers
- 6 Specialty Medical Networks



## HEALTHCARE HCM ENGAGEMENTS

- 1 System Selection
- 2 RFP Management
- 3 HCM Strategy & Roadmapping
- 4 Best Practice Advisory
- 5 Project Management
- 6 Implementation
- 7 System Optimization

# WHY HEALTHCARE IS DIFFERENT

Healthcare organizations operate in highly regulated environments, where workforce systems must support HIPAA privacy requirements, credentialing regulations, exclusion screening (OIG/GSA), and audit readiness. These requirements extend beyond traditional HR system expectations and apply across organizations of all sizes.

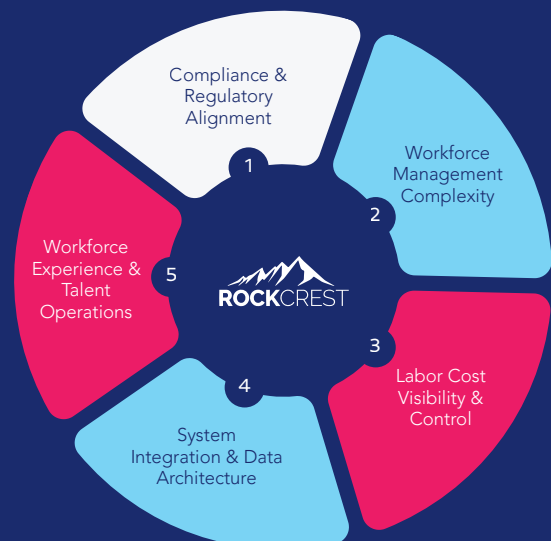
Workforce systems in healthcare must support employees working across roles, departments, and locations, often within the same organization. Clinical staff, administrative employees, contractors, and contingent workers each have unique scheduling structures, credential requirements, and compliance obligations that must be managed consistently.

Labor costs remain one of the largest operating expenses for healthcare organizations. Inefficient workforce processes can lead to increased overtime, staffing gaps, and added administrative burden.

Because of these factors, healthcare system selection requires a broader evaluation approach than traditional HR technology decisions. It is not simply about choosing technology, but about ensuring the system can support workforce operations, compliance requirements, and organizational visibility.



## DRIVERS OF SUCCESSFUL HEALTHCARE TECHNOLOGY SELECTION



# FOLLOW A STRUCTURED APPROACH

A structured approach to system selection helps organizations define how they operate today, how they need to operate in the future, and what the system must support to bridge that gap.

Many implementation challenges can be traced back to decisions made during selection. When requirements, budget, and operational needs are not clearly defined upfront, gaps often emerge later in implementation.

A disciplined methodology ensures that system selection is grounded in real operational needs, supported by clear cost expectations, and aligned to how the organization will function going forward.



Healthcare organizations should evaluate total cost of ownership, including licensing, implementation, integrations, and ongoing support. Budget decisions should align with operational complexity, workforce size, and long-term system use, not just initial cost.

# PHASE 1: ORGANIZATIONAL ASSESSMENT

Healthcare organizations are most successful when they define the workforce challenges they need to solve before evaluating HR technology.

Effective system selection starts with a shared understanding across leadership of the organization's most important operational priorities and workforce needs.

Before evaluating platforms, organizations should identify where greater visibility, automation, and compliance support can improve operations and reduce risk.

## ALIGN NEEDS TO SYSTEM CAPABILITIES

STRATEGIC QUESTION	REQUIRED CAPABILITIES
→ <b>Where are our compliance risks?</b>	Credential and licensure tracking, exclusion screening, certification management, audit-ready reporting
→ <b>Where are we overspending on labor?</b>	Overtime controls, scheduling visibility, agency labor tracking, acuity-aligned staffing, labor analytics
→ <b>Do we have real-time credential visibility?</b>	Automated alerts, credential dashboards, expiration forecasting, compliance-based scheduling controls
→ <b>Do we have the right staffing levels to meet patient demand?</b>	Staffing level visibility, vacancy tracking, demand forecasting, acuity-aligned staffing
→ <b>Can leadership access reliable analytics?</b>	Real-time dashboards, executive reporting, workforce and labor cost analytics, drill-down by facility and department



# PHASE 2: REQUIREMENTS DEFINITION

Once operational gaps are identified, the focus shifts to defining what the system must support and how the organization will operate going forward.

This phase translates current-state challenges into clear, prioritized system requirements while designing future-state processes that improve efficiency, consistency, and scalability. It ensures decisions are grounded in real operational needs, not assumptions.



## KEY ACTIVITIES INCLUDE:

→ <b>Define system requirements</b>	Document functional needs such as workflows, approvals, reporting, integrations, and data flows, along with user experience expectations across all user groups
→ <b>Prioritize what matters most</b>	Align requirements to business impact, risk, frequency of use, and critical integration dependencies
→ <b>Design future-state processes</b>	Streamline workflows, reduce manual effort, standardize operations, and ensure processes align with upstream and downstream systems
→ <b>Assess organizational impact</b>	Identify changes to roles, responsibilities, and decision-making, especially where integrations shift ownership of data or processes
→ <b>Evaluate skills and training needs</b>	Determine capabilities required and outline training for users and administrators, including managing integrations and system touchpoints
→ <b>Review staffing implications</b>	Ensure the organization is structured to support the future model, including ownership of integrations, data governance, and system administration

The result is a clear, actionable blueprint that aligns people, process, and technology, while ensuring the system fits seamlessly within the broader technology ecosystem. This sets a strong foundation for vendor selection, reduces implementation risk, and minimizes downstream integration challenges.

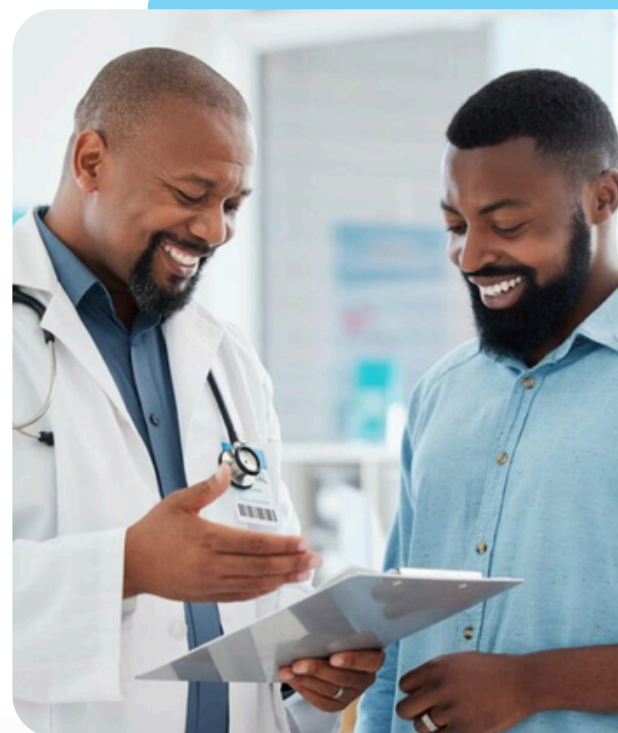


# PHASE 3: VENDOR MARKET SCAN

With requirements and future-state priorities defined, the next step is identifying the right set of vendors to consider.

This phase focuses on understanding the HCM vendor landscape and narrowing it to a targeted shortlist of solutions that are viable for your organization's size, complexity, and operating model.

Rather than evaluating platforms in depth, the goal is to quickly eliminate misaligned options and focus on vendors that warrant further analysis.



## Key Market Screening Criteria

- 1 Alignment to organizational size, workforce structure, and industry
- 2 Ability to support healthcare-specific regulatory and compliance needs
- 3 General fit for core HCM, workforce management, and talent capabilities
- 4 Presence of relevant customers and proven use cases
- 5 High-level alignment to budget expectations and total cost range
- 6 Compatibility with your broader technology environment

## Market Scan Output

- 1 Curated shortlist of vendors
- 2 High-level capability and positioning summary
- 3 Initial view of pricing ranges and licensing models
- 4 Identification of any clear risks or gaps
- 5 Defined vendor pool for structured evaluation in Phase 4

The objective of the market scan is not to select a vendor, but to define a focused, defensible shortlist for evaluation.

# PHASE 4: STRUCTURED VENDOR EVALUATION

With a defined shortlist of vendors, the next step is conducting a structured evaluation to determine the best fit.

This phase moves beyond high-level alignment and focuses on validating how each solution performs against your future-state workflows, compliance requirements, and day-to-day operational demands.

Evaluation is conducted through a controlled process that includes structured RFPs, scenario-based demonstrations, and hands-on validation. Vendors are assessed using consistent criteria to enable objective comparison across platforms.

The framework below defines how each solution is evaluated, scored, and compared to support confident decision-making and vendor selection.

## STRUCTURED VENDOR EVALUATION CRITERIA

Core Setup & Structure	Workforce Management	Data & Visibility	Compliance & Credentialing	Talent & Onboarding
Multi-facility organizational structure support	Advanced scheduling configuration	Real-time workforce dashboards	Automated license and credential tracking	Integrated background screening
Flexible job and position architecture	Overtime, premium pay, and shift rules	Labor cost and overtime analytics	OIG/GSA exclusion monitoring	Credential verification workflows
HIPAA-aligned security and role controls	Clinical staffing and coverage visibility	Vacancy and workforce planning insights	Credential alerts and scheduling controls	Clinical training and certification tracking
Data integrity and governance capabilities	Staffing compliance and labor controls	Audit-ready compliance reporting	Full compliance audit trails	Digital onboarding and documentation



Effective vendor evaluation requires structured RFPs, controlled demonstrations, and hands-on validation to confirm each platform's ability to support real-world operations.

# PHASE 5: VENDOR SELECTION

Phase 5 focuses on selecting the vendor that best aligns with your organization's operational, technical, and financial requirements.

This step brings together insights from structured evaluations, demonstrations, and stakeholder feedback to support a confident, well-informed decision. Rather than defaulting to the most recognized or lowest-cost option, selection is based on overall fit, long-term value, and the vendor's ability to support future-state processes.

In parallel, commercial terms are validated and refined to ensure alignment with expectations. Pricing, implementation scope, service levels, and contract terms are assessed and negotiated to reflect the agreed-upon solution and organizational needs.



Total cost of ownership, system compatibility, and organizational alignment are confirmed to ensure the solution meets both immediate priorities and long-term goals.

The result is a clear, defensible decision paired with aligned commercial terms, positioning the organization for a successful implementation and sustained value over time.

# PHASE 6: IMPLEMENTATION READINESS

With a vendor selected and commercial terms aligned, the focus shifts to preparing the organization for implementation.

This phase ensures the foundational elements across people, process, and technology are defined and aligned before execution begins. Key areas include confirming scope and timelines, establishing governance and roles, preparing data and integrations, and aligning stakeholders on expectations and responsibilities.

Organizational readiness is critical. Change management, communication, and user adoption strategies are developed to support a smooth transition and minimize disruption, while risks, dependencies, and resource needs are identified early.



The result is a clear, executable implementation plan with aligned stakeholders, defined ownership, and the groundwork in place for a successful rollout.

# A MARKET FULL OF OPTIONS

Healthcare organizations use a range of HCM platforms to manage workforce operations, payroll, compliance, and talent processes. While many solutions offer similar core functionality, determining the right solution often requires a more strategic assessment.

With so many options, effective evaluation is essential. When decisions focus mainly on features or vendor positioning, gaps in reporting, compliance, and workforce management often appear after implementation.

Successful selection requires a clear understanding of workforce needs, operational complexity, and regulatory requirements. Organizations that take a structured, requirements-driven approach are better positioned to choose a system that supports daily operations, compliance, and long-term success.



## EXAMPLES OF HCM PLATFORMS FOR HEALTHCARE ORGANIZATIONS



Schedule a consultation to align your HCM platform selection with your organization's operational, workforce, and regulatory requirements.

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