

HR Directors' Year End Strategic Checklist

Align your HR strategy for success with our comprehensive guide.

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Use this checklist to make sure you're ready to succeed in 2025.

Strategic planning and budget review

Performance review

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|---|---|--|
| 1 | Analyse department KPIs against yearly targets | |
| 2 | Review HR budget performance and variances | |
| 3 | Evaluate ROI on major HR initiatives | |
| 4 | Assess recruitment metrics (time-to-hire, cost-per-hire, quality of hire) | |
| 5 | Review employee turnover rates and patterns | |
| 6 | Analyse training and development program effectiveness | |

Forward planning

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|----|--|--|
| 7 | Review headcount plans with business leaders | |
| 8 | Plan major HR initiatives for coming year | |
| 9 | Update succession planning documentation | |
| 10 | Review and revise HR risk register | |

Compliance and policy

Legal compliance review

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|----|--|--|
| 11 | Audit compliance with employment legislation changes | |
| 12 | Review impact of any upcoming employment law changes | |
| 13 | Check IR35 compliance for contractors | |
| 14 | Verify right to work documentation is current | |
| 15 | Review sponsored worker compliance | |
| 16 | Assess GDPR compliance in HR processes | |

Policy updates

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|----|-------------------------------------|--|
| 17 | Review and update employee handbook | |
| 18 | Update HR policies and procedures | |
| 19 | Review flexible working policies | |
| 20 | Update DEI policies and initiatives | |
| 21 | Review remote working policies | |
| 22 | Assess health and safety policies | |

Compensation and benefits

Reward strategy

| | | |
|----|---|--|
| 23 | Review market salary benchmarking data | |
| 24 | Plan annual salary review process | |
| 25 | Review bonus scheme effectiveness | |
| 26 | Assess benefits package competitiveness | |
| 27 | Review pension scheme performance | |
| 28 | Plan recognition program updates | |

Performance management

| | | |
|----|--|--|
| 29 | Review performance management system effectiveness | |
| 30 | Plan timeline for annual reviews | |
| 31 | Update performance metrics | |
| 32 | Review promotion criteria | |
| 33 | Assess talent management programs | |
| 34 | Plan high-potential employee development | |

Employee relations and engagement

Employee engagement

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|----|--|--|
| 35 | Review outcomes / strategic objectives from employee engagement survey results | |
| 36 | Review outcomes / strategic objectives from exit interview data | |
| 37 | Review employee engagement plans | |
| 38 | Review internal communication effectiveness | |
| 39 | Assess workplace culture initiatives | |
| 40 | Plan wellbeing program updates | |

Industrial relations

| | | |
|----|---|--|
| 41 | Review union agreements if applicable | |
| 42 | Plan for any upcoming negotiations | |
| 43 | Assess employee relations metrics | |
| 44 | Review grievance patterns and resolutions | |
| 45 | Update employee consultation processes | |
| 46 | Review works council relationships | |

Learning and development

Training review

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|----|--|--|
| 47 | Evaluate training needs analysis | |
| 48 | Review learning and development budget | |
| 49 | Assess training provider relationships | |
| 50 | Plan leadership development programs | |
| 51 | Review apprenticeship programs | |
| 52 | Update skills gap analysis | |

Additional considerations

Career development

| | | |
|----|--|--|
| 53 | Review career progression frameworks | |
| 54 | Update competency frameworks | |
| 55 | Plan mentoring program updates | |
| 56 | Review internal mobility processes | |
| 57 | Assess graduate scheme effectiveness | |
| 58 | Plan succession development activities | |

Technology and systems

HR systems

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| 59 | Review HR information system performance | |
| 60 | Plan system upgrades or changes | |
| 61 | Assess HR analytics capabilities | |
| 62 | Review HR automation opportunities | |
| 63 | Evaluate end to end HCM technology stack | |
| 64 | Plan digital transformation initiatives | |

Data management

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| 65 | Audit HR data quality | |
| 66 | Review HR reporting effectiveness | |
| 67 | Plan data cleansing exercises | |
| 68 | Update HR dashboards | |
| 69 | Review data retention policies | |
| 70 | Assess people analytics capabilities | |

Stakeholder management

Board reporting

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| 71 | Prepare year end board report | |
| 72 | Update HR metrics dashboard | |
| 73 | Draft strategic initiatives proposal | |
| 74 | Prepare budget presentations | |
| 75 | Review governance reporting | |
| 76 | Plan board communication strategy | |

External relations

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| 77 | Review recruitment agency relationships | |
| 78 | Assess employer brand positioning | |
| 79 | Review external HR partnerships | |
| 80 | Plan corporate social responsibility initiatives | |
| 81 | Review environmental social governance (ESG) metrics | |
| 82 | Update investor relations HR content | |

Key deadlines and important dates

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| 83 | Annual report submission deadlines | |
| 84 | Board meeting dates for year end reviews | |
| 85 | Budget submission timelines | |
| 86 | Policy review deadlines | |
| 87 | Performance review cycle dates | |
| 88 | Strategic planning submission dates | |

Any questions? We're here to help.

Find out how we can support your organisation today

Or contact us tellmemore@zellis.com or 0800 0420315