

HR DIRECTORS' YEAR END STRATEGIC CHECKLIST

Align your HR strategy for success with our comprehensive guide.

Use this checklist to make sure you're ready to succeed in 2026.



Strategic planning and budget review

PERFORMANCE REVIEW

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

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

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

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

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

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

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

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

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

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

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	

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