



Is Your HR Ready for 2025?



Year-End HR Strategic Checklist

As the year draws to a close, it's the perfect time to review and refine the key elements of your HR strategy. Taking a proactive approach now can position your organization for success in the year ahead. This checklist is designed to help you focus on strategic planning and compliance, ensuring your HR processes remain efficient, competitive, and aligned with your company's goals.

Compensation and Benefits

Review Compensation Packages

_____ Evaluate your salaries, benefits, retirement plans, and time-off policies to ensure they're competitive and aligned with industry standards to attract and retain top talent.

Check Bonus & Gift Taxation

_____ Confirm bonuses, gift cards, and non-cash gifts are reported correctly and in compliance with tax laws, ensuring they're properly reflected on W-2s.

Employee Engagement & Retention

Strengthen Employee Development Programs

_____ Evaluate your training programs to ensure they align with company goals and job responsibilities, providing employees with the resources needed for career growth.

Assess Employee Recognition Programs

_____ Review how your organization rewards employees, ensuring recognition is consistent, inclusive, and aligned with business goals.



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Compliance and Legal

Audit Wage & Hour Compliance

_____ Ensure your organization complies with wage and hour laws, covering overtime, on-call pay, travel time, and discretionary and nondiscretionary bonuses.

FLSA Audit

_____ Review salaries to ensure they meet the minimum threshold and duties test for exempt employees.

I-9 Compliance Review

_____ Verify all employee documentation is current and meets immigration laws requirements.

Review Employee Handbook

_____ Update your handbook to reflect the latest policies, laws, and organizational changes. Consider a formal review with your management team if it hasn't been done in the last 1-3 years.

Prepare W-4 & W-2 Communications

_____ Send a year-end update to all employees with resources to help them navigate new W-4 forms and upcoming W-2s.

HR Technology & Systems

Evaluate HR Software & Tools

_____ Assess if your HR software and tools streamline processes and improve efficiency or employee experience. Plan for any upgrades in the coming year.

Risk Management & Safety

Conduct Safety Reviews & Update Protocols

_____ Ensure workplace safety protocols are current and comply with legal requirements. Complete any necessary audits or inspections before year-end.

Review Insurance Coverage

_____ Check that your organization's insurance policies, including workers' compensation, are adequate and current.



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Organizational Alignment & Talent Strategy

Ensure Job Descriptions Align with Roles

Check that job descriptions match employees' actual tasks and update them to reflect your business's evolving needs.

Link Performance Reviews to Organizational Goals

Ensure performance reviews align with job descriptions, company values, mission, and goals. Refine the process if they are not fully connected.

Operational Efficiency

Minimize Manual HR Processes

Identify manual tasks in payroll, accounting, or HR (e.g., spreadsheets) and explore opportunities for automation to save time and reduce errors.

Shift Focus to Strategic Planning

Assess how much time your leadership spends on administrative tasks versus strategic planning. Delegate or automate routine tasks to free up time for revenue growth and strategy.

This checklist helps you take a strategic approach to HR as you prepare for the new year. By prioritizing compliance, talent strategy, and operational efficiency, you'll be set to drive your organization's success and growth in the year ahead.

If you answered **NO** to any of these items, don't hesitate to reach out to our team for expert HR guidance and support. Visit us at xpansehr.com.

