

Human Resources Due Diligence Template

Consulting Firms

1. Company Overview

Firm Name:

Date of Due Diligence:

Prepared By:

2. Organization Structure

Provide a summary of current organizational structure (attach org chart if available):

3. Workforce Composition

Category	Number	Notes
Partners/Directors		
Consultants		
Analysts/Associates		
Support/Administrative Staff		
Contractors / Interns		

4. Key HR Policies & Procedures

List or summarize key HR policies (e.g., Recruitment, Onboarding, Code of Conduct, Diversity & Inclusion, Performance Review, Termination):

5. Employee Agreements & Documentation

1. Standard employment contract used
2. Non-compete / Non-disclosure agreements
3. Consulting agreements (if applicable)
4. Document retention practices

Any issues or gaps identified:

6. Compensation & Benefits

Component	Description/Notes
Base Salary	
Bonus/Incentive Plans	
Equity / Profit Sharing	
Health & Welfare Benefits	
Retirement Plans	
Other Benefits (e.g., remote work, allowances)	

7. Compliance & Legal

- Employment law compliance (local, state, federal)
- Discrimination and harassment policy
- Visa / Work permit status
- HR-related litigation or disputes

Notes:

8. Training & Development

Current programs (onboarding, professional development, leadership, etc.):

Planned or required improvements:

9. Key Risks & Recommendations

Summarize major HR-related risks identified:

Recommendations:

10. Additional Comments

