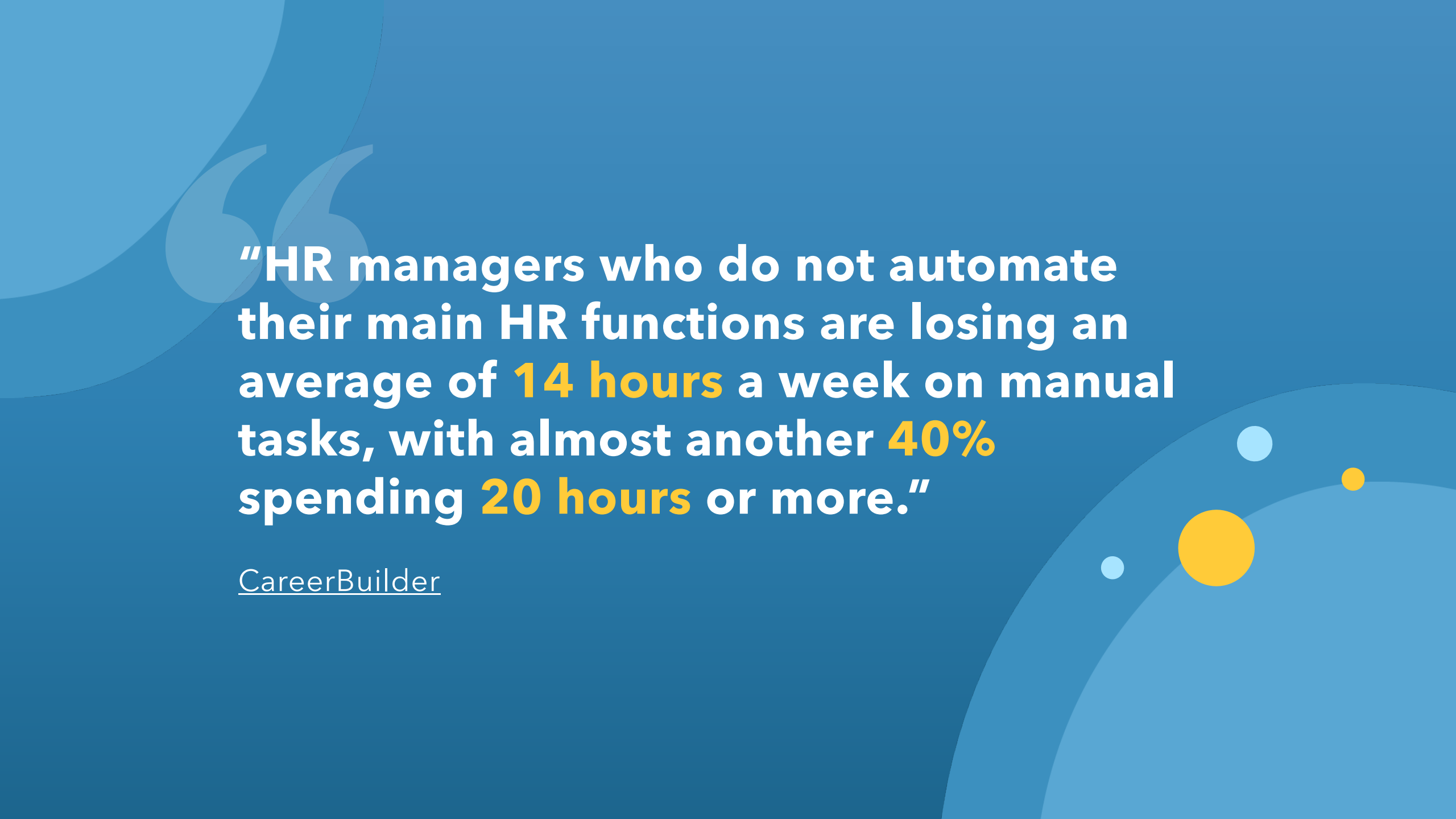




# TRANSFORMING HR THROUGH AUTOMATION

How digital automation creates a  
better experience for everyone





**“HR managers who do not automate their main HR functions are losing an average of **14 hours** a week on manual tasks, with almost another **40%** spending **20 hours** or more.”**

CareerBuilder

# INTRODUCTION

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**As an HR practitioner, you know that having a never-ending list of things to do is part and parcel of the job.**

Chances are you're on the frontline of ensuring that a host of essential people-related activities get completed on time. But, keeping on top of paperwork and processes can be exhausting for even the most experienced HR professionals.

This guide explores the key day-to-day challenges HR professionals face, and how automation can help tackle them. We also introduce the top five key HR processes you should automate.



# WHY AUTOMATE?

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**What is most important to you in HR?**

Is it staying on top of your admin and ensuring compliance?

Or is it finding ways to help develop and retain your people

The answer, of course, is **both**.

So, what's holding HR back?

# UNFORTUNATELY, MANY HR PROFESSIONALS FIND THEMSELVES OVERWHELMED BY MANUAL PROCESSES THAT IMPOSE:



## EXCESSIVE ADMIN BURDENS

After setting up Harry's desk for his first day, reminding the sales director that Francis' probation is ending soon, checking Sally's right to work documents, and responding to emails about holiday entitlements... what time do you have left to find better ways to manage, motivate, develop or engage your employees?



## INFLEXIBLE PROCESSES

Every organisation goes through change, growth or transformation, and leaders expect HR to adapt too. That makes the manual management of HR processes ineffective when it's time to scale up or shift to match these changes. It may even become a significant roadblock in the transition.



## UNNECESSARY FRICTION

Employees and their managers expect to have more autonomy over information than in the past. Manual, laborious HR processes with little transparency slow everything down, and can cause frustration among your workforce - and for already over-stretched HR teams.

# AUTOMATION SOLVES THOSE CHALLENGES BY HELPING YOU MINIMISE MANUAL INTERVENTION ON TIME-CONSUMING BUT ESSENTIAL HR OPERATIONS:



## ENSURES YOU CAN FLEX AND SCALE

Whether your organisation triples in size, ventures out beyond local borders, or is faced with re-organisation, having important functions automated ensures that essential HR processes continue to run smoothly.



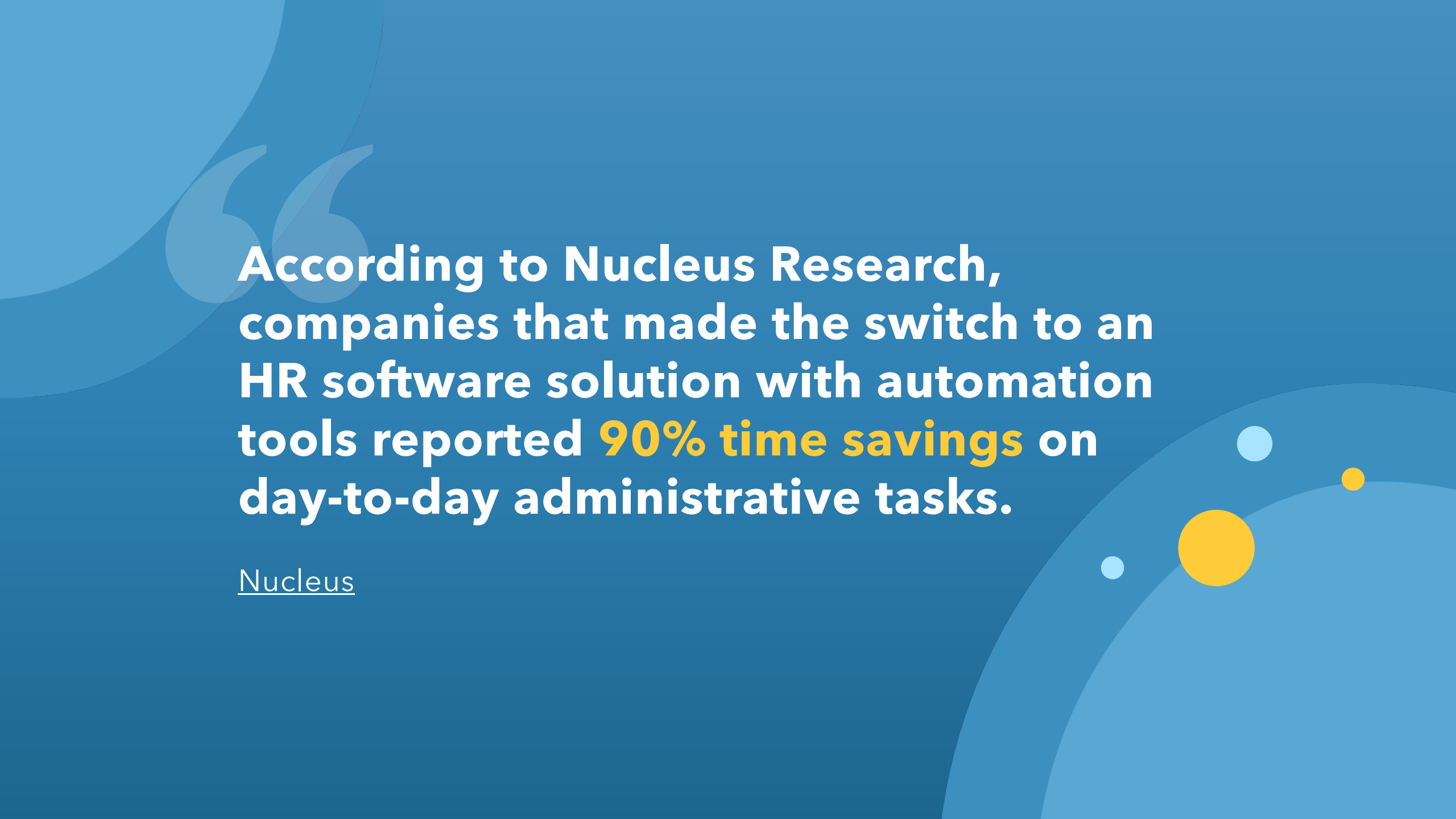
## SAVES EVERYONE TIME

Automating the flow of activities and information around the organisation helps make tasks easier and quicker to complete. This frees up both yours and your employees' time to focus on more value-added activities.



## IMPROVES THE EMPLOYEE EXPERIENCE

Putting employees in control of their own data, and lessening the friction caused by time-wasting manual processes, will have a significant impact on overall employee engagement.



According to Nucleus Research, companies that made the switch to an HR software solution with automation tools reported **90% time savings** on day-to-day administrative tasks.

Nucleus



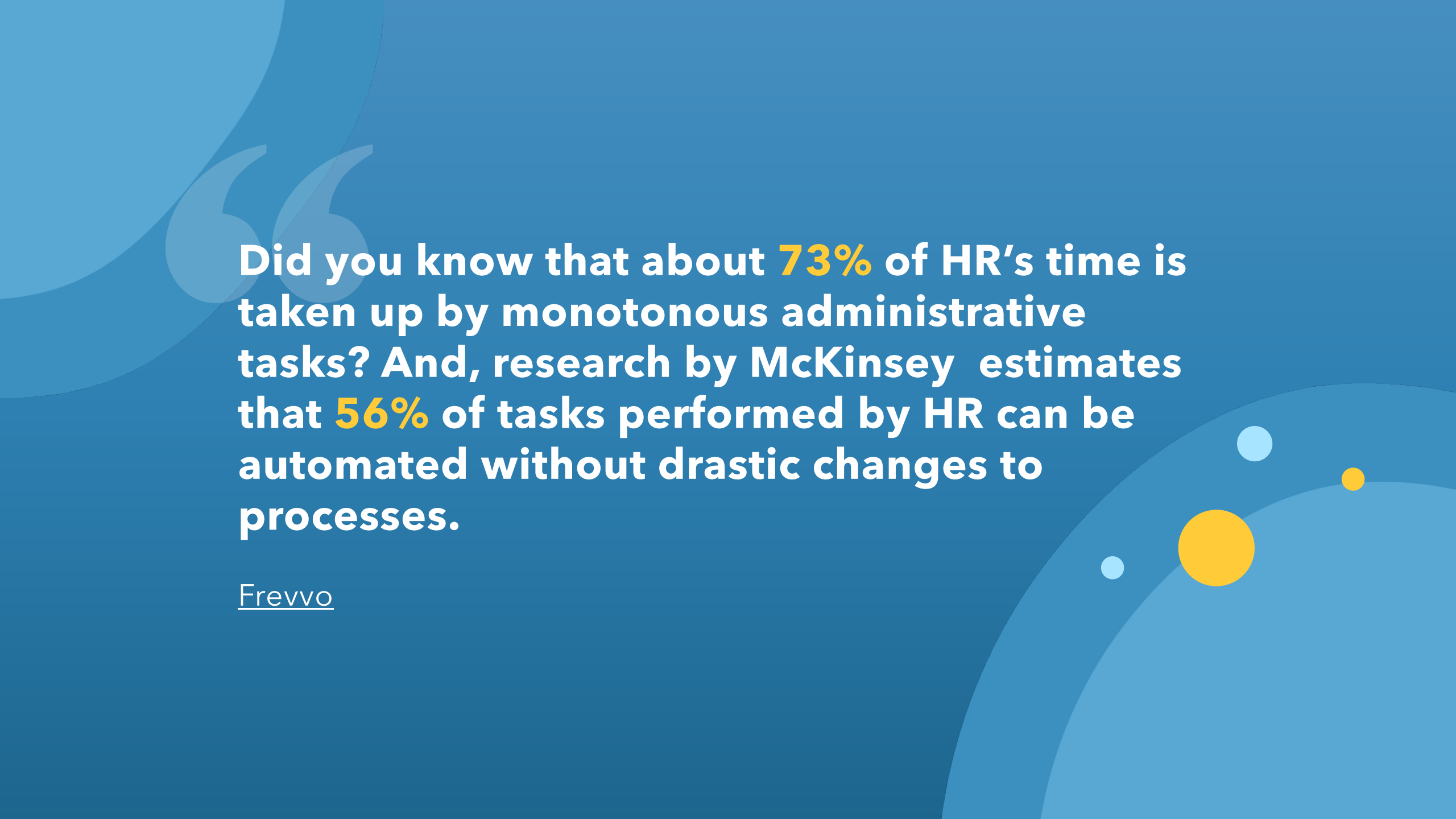


# THE TOP FIVE

HR processes you should automate right now







Did you know that about **73%** of HR's time is taken up by monotonous administrative tasks? And, research by McKinsey estimates that **56%** of tasks performed by HR can be automated without drastic changes to processes.

Frevvo

# 1. ESSENTIAL PAPERWORK

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**Effective HR record-keeping and documentation is the foundation of HR best practice.**

It is not just important for day-to-day operations and legislative compliance, but it ensures HR teams and business leaders can make well-informed strategic decisions.



# 1. ESSENTIAL PAPERWORK

## What's getting in the way of effective employee record-keeping?

- **Too much paperwork** - from employment contracts to fit to work notes, and from payroll to performance reviews, processing paperwork eats up too much of your time
- **Duplicated data entry** - time spent updating multiple data sources costs time (and money). According to EY, the average cost per manual data entry is \$4.51
- **Misplaced or incomplete documents** - having to rifle through filing cabinets or chase up others on important paperwork further delays admin processes
- **Inaccurate or outdated data** - this can negatively affect data-driven decisions and risk compliance failures.

### HOW AUTOMATION WILL HELP

- ✓ Frees up your time by digitising data and documents and allowing you to safely share the burden of data entry with line managers and employees
- ✓ Avoids the need for duplicate data entry
- ✓ Ensures documents are easy to find, and makes chasing up missing information simpler too
- ✓ Helps keep information up to date by sending out reminders when updates are due, evidence needs to be provided, or just to keep everyone informed.

## 2. RECRUITMENT

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**Effective recruitment is critical to the continuity and growth of every organisation, whatever your sector or size.**

In a competitive, fast-changing world, recruitment processes must be agile, appropriate and cost-effective.





## 2. RECRUITMENT

### What's getting in the way of an efficient recruitment process?

- **Slow job advertising** - the longer it takes to fill a role, the more likely your business is left at risk, so getting the word out fast is extremely important
- **Long selection processes** - with CV screening taking an average of more than 5 days, a lot of time that could be used towards more impactful work is lost
- **Broken communication** - candidates having to chase up organisations between stages can show disinterest on the part of the employer, which risks losing your best applicants.

### HOW AUTOMATION WILL HELP

- ✓ Gets your vacancies out to the target audience quicker by automatically publishing jobs online (and removing them when they have expired)
- ✓ Shortens the time it takes by helping you to filter out inappropriate CVs, and routing candidates through your selection process
- ✓ Helps maintain smooth communication by triggering emails based on your selection steps, creating a much better candidate experience.

# 3. ABSENCES

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**An effective absence management system helps HR strike a balance of doing what's best for your employees (e.g. ensuring employees get holiday they are entitled to, and supporting them if they are sick), and what's best for the business (e.g. making sure teams are not left short-handed, or compliance steps missed).**

Automation can help you keep your absence policies, leave approval workflows and absence trend reporting in one place. This means you'll have all the information needed in getting that balance right.





# 3. ABSENCES: HOLIDAYS

## What's getting in the way of seamless holiday management?

- **Time-consuming entitlement calculations** - manual calculating and updating holiday entitlements wastes your time, and is prone to error
- **Slow approval flows** - email trails or paper-based processes cause frustration for employees and line managers alike
- **Entitlement invisibility** - if employees have to check with HR how much paid leave they have left, it only adds to the HR workload
- **Limited reporting** - with data scattered everywhere, keeping key management reports up to date or ensuring legislative compliance can become a nightmare.

### HOW AUTOMATION WILL HELP

- ✓ Saves HR time and ensures accuracy by calculating holiday entitlements based on local legislation, working time patterns, public holidays and company rules
- ✓ Simplifies holiday requests and approvals for employees and their managers by automatically routing requests to the right people
- ✓ Provides employees with a clear view of their absence records, and line managers of their team's absence schedule
- ✓ Improves insight and helps inform other decisions, such as resourcing.



**“Cezanne HR gave us the opportunity with employee self-service to give our people ownership and allow our management team to have a vital overview of what is really going on. Managing leave requests is much easier now as it’s now virtually all automated. Self-service has just worked incredibly well for everyone!”**

Somerset Skills and Learning,  
Read the full success story [here](#)

# 3. ABSENCES: SICK LEAVE

## What's getting in the way of seamless sickness management?

- **Inefficient record-keeping** - having employees call in when they are sick makes sense, but manually updating their records can easily lead to information inaccuracy and missed steps
- **Difficult compliance checks** - knowing when to ask for fit-to-work notes, calculating sick pay entitlements, or managing long-term sickness or back-to-work adjustments, is hard without the help of automation
- **Reporting burden** - poor or difficult reporting makes it almost impossible for HR to see the bigger picture - or know where to step in to help individual employees or the wider business.

## HOW AUTOMATION WILL HELP

- ✓ Ensures information is accurate through a simple, central recording of sickness absence
- ✓ Flags up key compliance steps, such as reminding employees to provide self-certification or fit to work notes through rule-based triggers
- ✓ Equips HR teams - and line managers - with easy-to-generate absence reports to help them take a proactive approach to employee wellbeing and business continuity.

# 4. ONBOARDING

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**Studies have shown that if done right, a well-planned onboarding programme has a positive impact on employees and the organisations they work for.**

Effective onboarding increases retention and engagement, helps get employees up to speed quicker, and promotes company culture from the start.



# 4. ONBOARDING

## What's getting in the way of successful onboarding?

- **Communication gap** – best practice dictates onboarding starts once you make the job offer, but there's often no time to stay in touch with everyone
- **Disconnected documents** – if vital documentation must be collected using email, time can be wasted and tracking is a challenge
- **Orchestration limitations** – scores of activities and people need to be organised for smooth onboarding, but ensuring everyone does what they are supposed to can prove tricky
- **Training shortfalls** – without scheduling appropriate induction and training, employees are likely to struggle to perform at their best and become disengaged
- **Onboarding oversights** – it is too easy for onboarding best practices, like regular check-ins, to be skipped after the first few days, leaving new joiners feeling lost or isolated.

### HOW AUTOMATION WILL HELP

- ✓ Allows you to set up standard onboarding processes that trigger personalised communications to new staff at the right time
- ✓ Centralises document distribution and storage, so processes run smoothly and everything is in one place
- ✓ Nudges participants to complete tasks on time and makes it easy to track activities, e.g. completing reference checks
- ✓ Makes training scheduling simpler and ensures reminders are sent at the right time
- ✓ Helps new employees get the ongoing support they need by triggering follow up tasks for line managers or mentors.



**“The Cezanne HR Onboarding module has streamlined and simplified all our new starter actions and the feedback from new hires has been really positive. It sets a great first impression of the Company. With the system, it’s now simple for us to keep track of our entire onboarding process.”**

Dairy Partners,  
Read the full success story [here](#)



# 5. PERFORMANCE MANAGEMENT

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**Performance management is key to ensuring alignment between the business and their employees.**

Managed well, it boosts motivation, improves outcomes and provides invaluable information that allows HR and line managers to identify development opportunities, and make better-informed decisions.



**“Cezanne HR has made the whole appraisal cycle more intuitive and straightforward. It automates the process of sending and tracking appraisal forms, it’s all done in the one place, and everyone can see everything involved in their own appraisal. It’s definitely solved an issue there!”**

AgDevCo,  
Read the full success story [here](#)

# 5. PERFORMANCE MANAGEMENT

## What's getting in the way of effective performance management?

- **Time-consuming distribution** - manually sending out, collecting and collating performance reviews.
- **Lack of control** - Once sent out, you don't know who's responded, who needs chasing up, or who's been missed altogether.
- **Difficult to access** - relocating them again for follow up actions takes time
- **Too infrequent** - given the admin overheads, it is hardly surprising the performance reviews don't happen as often as they should
- **Promises get broken** - too often it is easy for forms to get filled in, filed and forgotten.

### HOW AUTOMATION WILL HELP

- ✓ Saves time by automatically distributing and collating appraisal forms, providing HR teams with real-time performance insights
- ✓ Ensures HR - and participants - have visibility over the complete process, and automatically triggers reminders to help ensure key deadlines aren't missed
- ✓ Provides easy, secure online access 24/7
- ✓ Allows regular check-ins and formal reviews to be run often and easily, proving a more agile and rewarding experience for employees and their reviewers
- ✓ Keeps agreed activities visible to all participants - including HR.

# WHO WE ARE

**Cezanne HR is the leading UK supplier of modern, easy-to-adapt Cloud HR systems for mid-sized UK and global businesses.**

Trusted by thousands of HR professionals in the UK and worldwide, our mission is to make it easy to transform HR by providing best-in-class HR software that streamlines and improves every aspect of human resources management - saving you time and helping everyone work smarter together.

We also provide dedicated customer support that's second to none, along with monthly system releases that ensure you never, ever, have to pay for expensive implementations or future upgrades again.

Designed to fit your needs today and support your business tomorrow, Cezanne HR helps businesses work smarter and achieve more.

**BOOK A DEMO**

**GET A QUOTE**



The logo for Open GI, featuring the text "open gi" in a dark blue, lowercase, sans-serif font. The text is centered within a white rounded square.

open gi

Find out how leading fintech company in the general insurance industry, Open GI, saw **80%** time-saving with a modern HR system on their admin tasks.

[READ CASE STUDY](#)