

Transforming HR

How automation creates a better experience for everyone



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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.

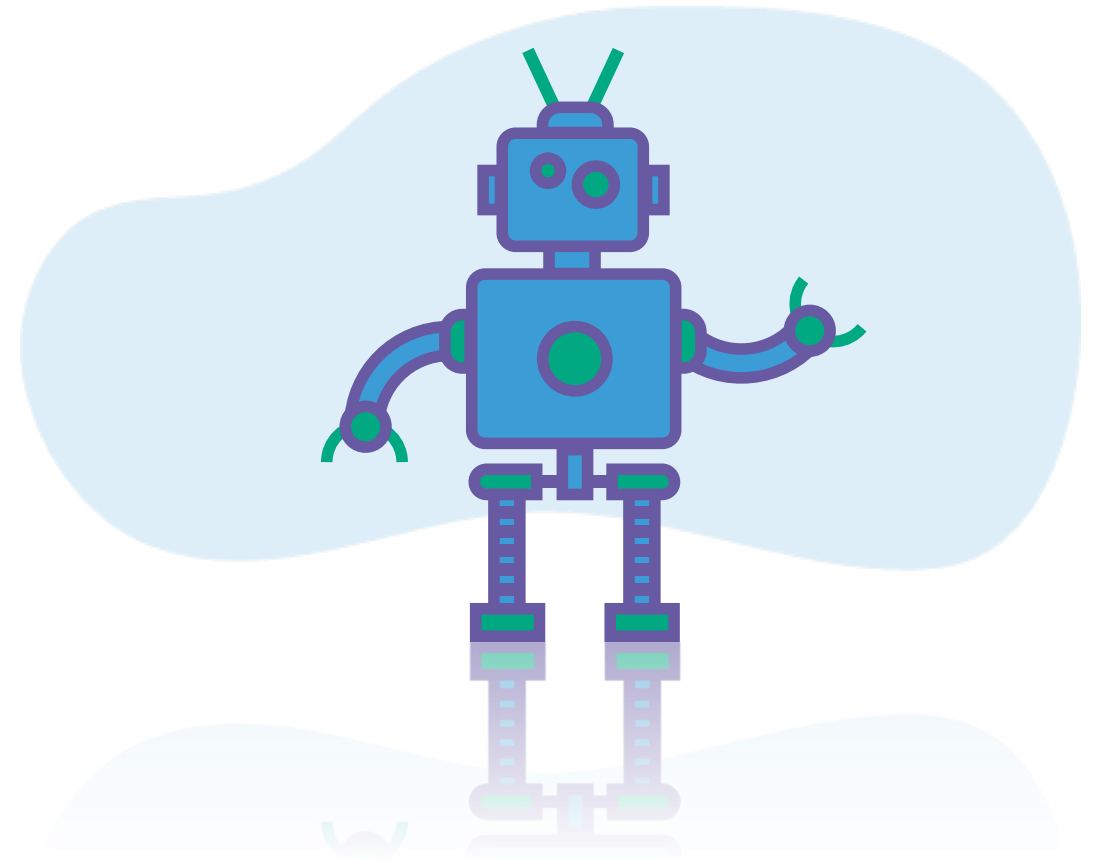
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Introduction

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 at the frontline of ensuring that a host of essential people-related activities get completed on time. Keeping on top of paperwork and processes can be exhausting for even the most experienced HR professionals.

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



Why automate?

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?



Why automate?

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.

Why automate?

Automation solves these challenges by helping you minimise manual intervention on time-consuming but essential HR operations:

Saves everyone time

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

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.

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 engagement for employees and their managers.

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A lot of this administration related around people simply goes away, so that means you can spend far more time on value-added tasks.

Neil Gibbs, HR Director at AB Dynamics

The top five HR processes you should automate right now



1. Essential Paperwork

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** – updating multiple data sources costs time and money, with the average cost per manual data entry being [\\$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

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 have to 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

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).

By automating leave approval workflows and keeping employee absence data in one place, you'll have all the information needed in getting that balance right.



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We monitored and calculated holidays, just using a spreadsheet and it was a nightmare. People were constantly coming up to me to ask “How much holiday have I got left?”

Anette Abrahamsen, HR Manager at Virtualstock

3. Absences: Holidays

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

- **Time-consuming entitlement calculations** – manually calculating and updating holiday entitlements only waste your time, and are 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

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

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



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 necessary documentation has to be collected using email, time is 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 may disengage too
- **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

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

5. Performance Management

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.



5. Performance Management

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

- **Time-consuming distribution** – manually sending out, collecting and collating scores of performance reviews are highly inefficient, and rarely deliver the insights HR teams need
- **Lack of control** – once sent out, appraisal forms are effectively invisible, so it's difficult to know who needs to be chased up, or has been missed out 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, causing busy managers to fail on arranging development opportunities and employees are left feeling let down

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

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With better tools in the hands of employees and managers, HR resources can be untethered from much of their paper pushing and transaction processing tasks, which allows them to spend more time proactively working with their business partners.

PwC



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