Creating an intelligent

HR AUTOMATION STRATEGY

Introduction

A desire to improve operational efficiency—while also relieving employees from manual tasks so they can engage in higher-level tasks—has driven many organizations to look at how they can leverage automation in their operations.

The Society for Human Resource Management (SHRM) defines automation as: "The use of electric or mechanized processes to perform work without— or with reduced—intervention by humans. Examples include robots that flip hamburgers, computer algorithms that eliminate human employees in medical and legal offices, and driverless automobiles and aerial drones."

Employers understand the value that automation brings, both in relieving employees of tedious tasks and improving operational flow. A 2020 global survey conducted by McKinsey found that 66% of employers were testing solutions to automate at least one business process, which was up from 57% two years prior.

Automation is especially valuable for HR teams that want to leverage their skills to move the human resource strategy forward.

"Helping employees and managers resolve challenging workplace issues is why many people go into HR in the first place, "PwC's learning strategy leader Mike Pino told SHRM. "By taking them away from data entry or cutting and pasting email responses, it allows more of these valuable in-person conversations to happen between HR and the workforce.

If they're burdened by data entry and manual tasks, the HR professionals in your organization are likely craving time to pursue the responsibilities that initially inspired them to work in human resources—connecting with people.

In this guide, we'll look at

- How automation benefits employers and employees alike
- What tasks HR should consider automating
- Which systems HR can use to automate

Using an intelligent automation strategy, you can help your HR team put their interpersonal and uniquely human skills to use.

What's the value of HR automation?

The key to successful HR automation strategies is finding the balance between technology and human interaction. Leaders have to ask important questions to ensure they're making the right choices regarding digitization and technology. The first step is understanding what tasks workers want to remove from their jobs.

Workers surveyed by Smartsheet "look forward to spending less time on repetitive manual tasks like data entry, and to spending more time on rewarding aspects of their work. Over 40% of workers surveyed spend at least a quarter of their workweek on manual, repetitive tasks, with email, data collection, and data entry occupying the most time."

Smartsheet's survey uncovered two key productivity issues that employees would like to see automated:

- **Data collection** to help decrease manual data entry as well as human error. More than half of respondents saw value in automating the collection, upload, and data sync into a system of record.

- **Approval processing** to increase efficiency to get sign-offs and confirmation requests, according to 36% of respondents.

A shocking 60% of the workers surveyed estimated they could "save six or more hours a week if the repetitive aspects of their jobs were automated." Nearly three-fourths said they would use those extra hours to do work that adds more value, and 78% said they would focus on what they find most exciting and rewarding about their job.

Some predict that using the power of automation may become "the dividing line" between HR practitioners who advance and those who are automated out of their HR jobs. A partner with KPMG told the Society for Human Resource Management (SHRM) that some HR organizations "have woken up and are leading a higher-purpose conversation on the trajectory of automation within their organizations. But far too frequently, I'm seeing other business divisions raise the issue, and HR is nowhere to be seen."

The partner from KPMG predicts that if HR doesn't step up to the automation challenge, they may find themselves being taken over by IT or other departments with demonstrated progress in embracing technology and automation.
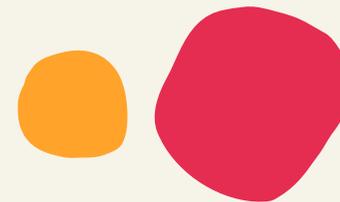
How can HR embrace automation?

For HR teams, transitioning tedious tasks to automated methods means you not only provide a better experience for HR, but automation also helps provide better employee and candidate experiences. Automation is a way to increase consistency and efficiency across HR.

Two out of three HR managers agree that the industry is going through a digital transformation, according to KPMG. Unfortunately, a mere 40% have a plan for how to embark on this new approach.
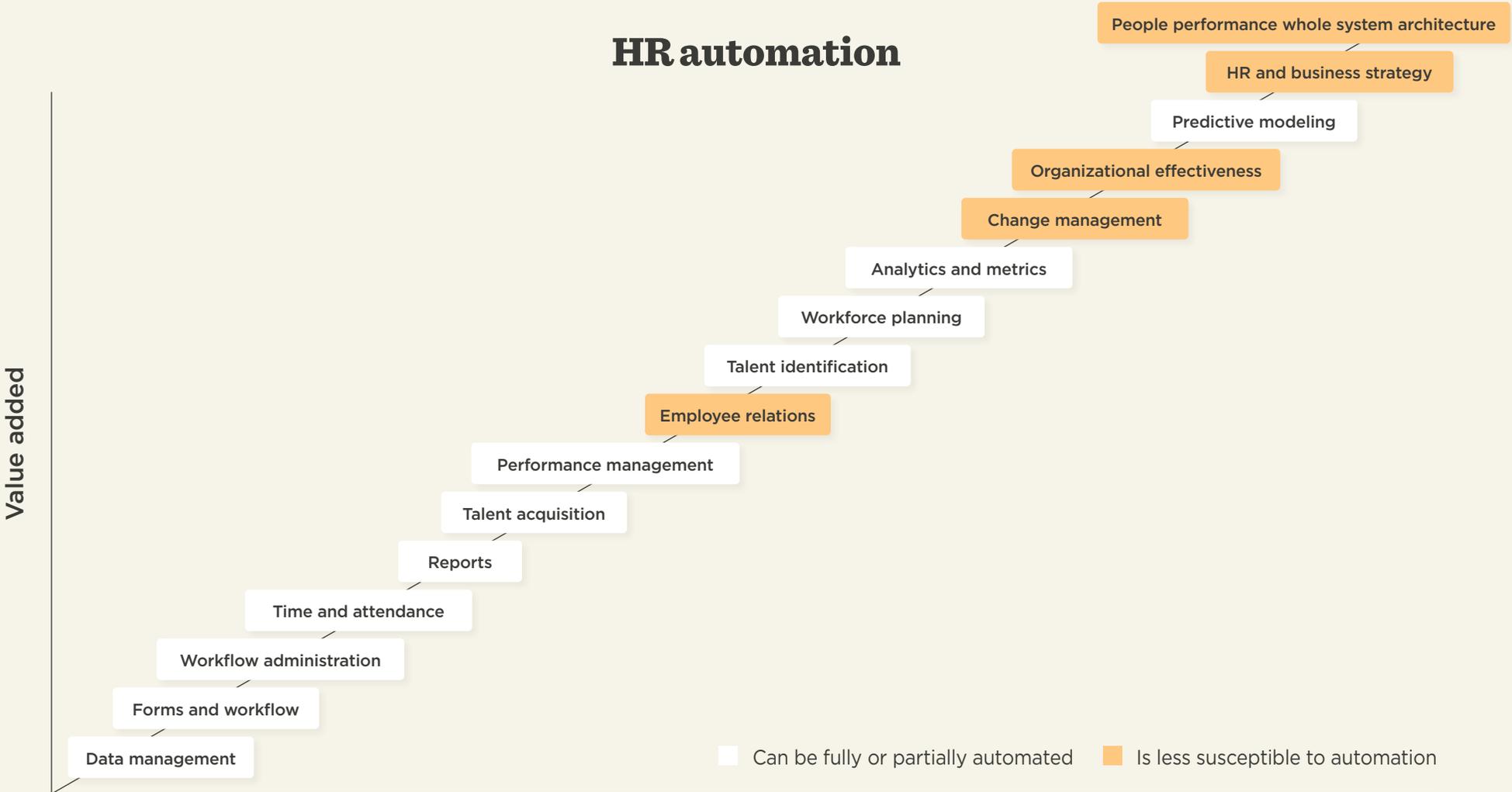
According to reports from SHRM, most HR functions can be at least partially automated. There are just five HR areas that won't benefit from automation:

1. People performance whole system architecture
2. HR business strategy
3. Organizational effectiveness
4. Change management
5. Employee relations

Not surprisingly, each of these areas requires high levels of personal interaction and engagement.

Automation of HR does not equate to reduced headcount. Instead, with automation, an HR team can expand the abilities of existing team members to deliver even more value for the organization.

HR automation

People performance whole system architecture

HR and business strategy

Predictive modeling

Organizational effectiveness

Change management

Analytics and metrics

Workforce planning

Talent identification

Employee relations

Performance management

Talent acquisition

Reports

Time and attendance

Workflow administration

Forms and workflow

Data management

Value added

Complexity

☐ Can be fully or partially automated   ☐ Is less susceptible to automation

Source: KPMG International

Uncover automation opportunities in the employee life cycle

If you want to identify specific ways to automate tedious HR tasks, start by examining the employee lifecycle. For each phase, there are likely processes you can modify to make them less manual. In fact, there are possibly several tasks you can automate entirely.

Recruit and hire: Recruiters can use automation to post to job boards and use AI to streamline text conversations with applicants as well as scan applications for crucial data and information. Chatbots can provide automated sourcing, which recruiters can then use to widen and connect with the pool of qualified candidates.

Onboard employees: Rather than recreating offer letters for each new hire, automation can help hiring managers conduct the entire process through an applicant tracking system. Not only does this speed up the process, but it also reduces the chances for costly and embarrassing errors. Once someone is hired, onboarding automation helps transfer their data into your HRIS so that they receive benefits enrollment and other new employee information.

Train: If each employee must complete compliance or other training every year, it doesn't make sense for the learning and development team to assign that course to every employee manually. Instead, you can use automation in your learning management system (LMS) to enroll employees, track completion, and send reminders if employees don't complete it on time.

Manage performance: Managers often gather 360-degree feedback when writing annual reviews. Collecting and compiling that data takes time. If managers have access to an automated performance management system, they can send the request and collect feedback in one spot. Likewise, automation can enable employees to create and manage their work history and records, including employment milestones, timelines, and recognition.

Organize compensation: To simplify compensation processes, automation can enable your HR team to plan, set up, and manage compensation cycles. Likewise, a system can be set up to deliver automated alerts and notifications to ensure compensation planning is on track and on time.
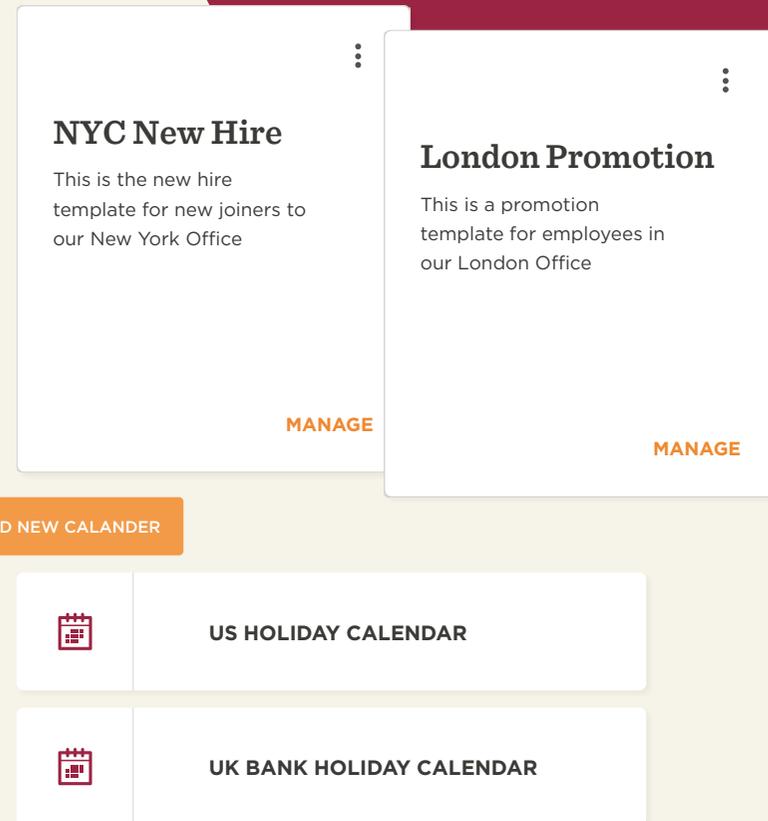
Administer benefits: Whether you're offering health care, wellness, or voluntary benefits, with automation, you can track essential information. Similarly, automation in benefits helps address employee access to information about their current enrollment and plan options.

Offboard employees: Just as automation helps you streamline the process when someone joins your organization, it can help when someone leaves. As an employee's status in the HRIS updates to reflect a termination, automation can help ensure they receive all the necessary documents and information about final pay, benefits, and access to their employment records. This removes the need for HR to track every termination and send unique emails to the person leaving the organization.

Many, if not most, HR organizations are adopting HR technology to help them automate their processes.

"The growth rate in HR technology is also astounding. In 2019, 54% of companies told us they were increasing their spending, 42% were staying steady, and only 4% were decreasing. Of this spending, the fastest-growing areas were talent management systems, core HR systems (which are rapidly being upgraded with cloud platforms), business intelligence and analytics, and workforce management and payroll systems," according to Josh Bersin's HR Tech 2021: The Definitive Guide.

Indeed, with so many elements to managing the hiring, performance, pay, and development of your workforce, there are many technology options for HR to consider when it comes to automating tedious tasks.

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So many systems, where should you start?

"Everything that happens at work–from the minute you leave home to the minute you clock out at night– is a step, stage, or series of activities that can be facilitated and improved by technology," according to Josh Bersin in HR Tech 2021: The Definitive Guide.

Bersin goes on to explain that, first and foremost, organizations require a system of record. Due to the myriad of applications and systems that HR teams need to use, companies need "sound architectures" to bring all these things together.

"Companies are throwing money at HR tools right now, searching for ways to transform their workforces, make people more productive and improve quality of hire, skills development, and employee engagement and retention," according to Bersin. "But this is starting to create chaos. As companies move to the new generation of tools, the number of systems they buy is going up. The average large company now has 9.1 core talent applications (up from 7 in 2018), and is spending $310 per employee per year, a 29% increase over last year."

One way to reduce this chaos is one system that connects and supports your recruiting, training, performance management, and other apps under one roof. A human capital management (HCM) or HRIS platform is the piece in the HR technology puzzle that provides the overarching architecture you need. These are "core" HR systems that help employers manage employee records, job history, performance, and training.

When organizations use the full power of an HRIS, tedious tasks can be automated. Rather than being bogged down with time-consuming processes or switching between multiple apps, integrated HRIS technology allows HR teams to focus on HR solutions to business-critical issues.

As you consider the many options available to automate HR with an HRIS, ask each provider how their system will help you automate:

- Applicant tracking
- Onboarding
- Training
- Performance management
- Compensation and benefits
- Employee profiles and self-service

Look for an HRIS that will help you architect and implement simple automation and increase HR's capacity and productivity.

Finally, keep people and the human experience as the top priority in your search for automation. Technology paves the path for us to continue serving the people who are the heart and soul of the organization. Whether it's your employees or HR team members using automation systems, the technology needs to work for them.

Conclusion

Will automation take over HR? It's unlikely.

Yes, we're surrounded by automation, and HR isn't exempt. But there are only a few HR tasks that don't require some level of decision-making, business acumen, or interpersonal skills.

"Automation will lead to a declining number of generalist employees responsible for mundane, repetitive transactional tasks, including HR generalists," according to experts. "At the same time, more HR staff will be performing analytical functions and getting more involved with other organizational activities."

If you're worried about robots taking over your department, don't be. Instead of a takeover, automation can help reduce the tedious tasks your HR team must tackle day in and day out. HR teams can get away from manual processes and procedures and instead use their time to contribute the valuable skills they have to offer.

There's no denying that technology is transforming HR functions. Every step of the employee lifecycle still requires HR's involvement — but now you can do so as strategic partners who are supported and backed by a powerful, automated system. Now is the time for HR to engage in conversations with IT, operations, and other stakeholders to maximize automation across the organization. All the while, HR can reinforce the importance of keeping humans at the top of the agenda as part of ongoing automation efforts.

Meet bob

The right technology is essential.

bob is designed and developed for the new world of work. Onsite, hybrid work, and remote HR leaders can drive culture, two-way communication, engagement, performance, and compensation— all while streamlining and automating their own processes. All leaders and individual contributors in the organization can benefit from bob by using it as a data source and report generation tool for planning and tracking.

bob's innovative UI, automated processes, and integrations with leading third-party tools ease administrative tasks for everyone across the organization and make even the most mundane work tasks pleasant, intuitive, and engaging—and not just for HR admins. bob puts people first with culture tools that connect co-located and remote employees to their fast-growing, global companies.

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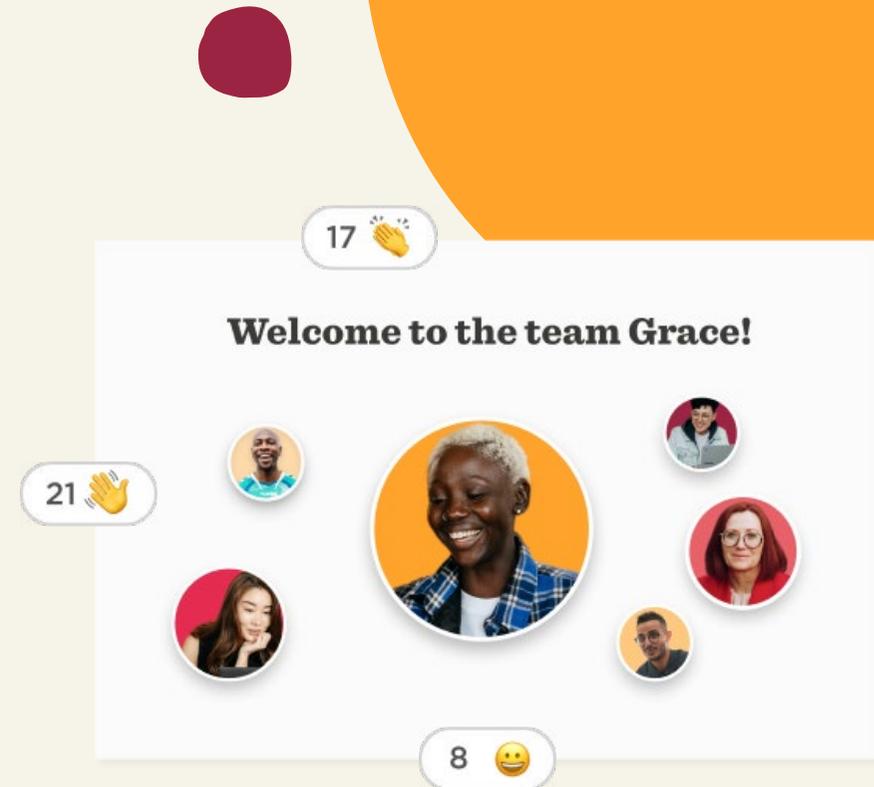
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