From onboarding to promotions:

MASTERING HR AUTOMATION WITH BOB'S TASK LISTS

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Introduction

We've all had that sinking feeling when we realize we've forgotten something important.

Forgetting a friend's birthday: a bit awkward but entirely forgivable.

Forgetting to send a remote team member their work laptop on time: very awkward and not so forgivable.

In the modern HR landscape, there's no room for slip-ups. As businesses grow, relying on manual processes and memory isn't just an inefficient way to do things—it's also risky. This is why opting for a flexible HR tech platform with seamless integrations and robust automation capabilities (think onboarding processes) can boost efficiency across the entire organization.

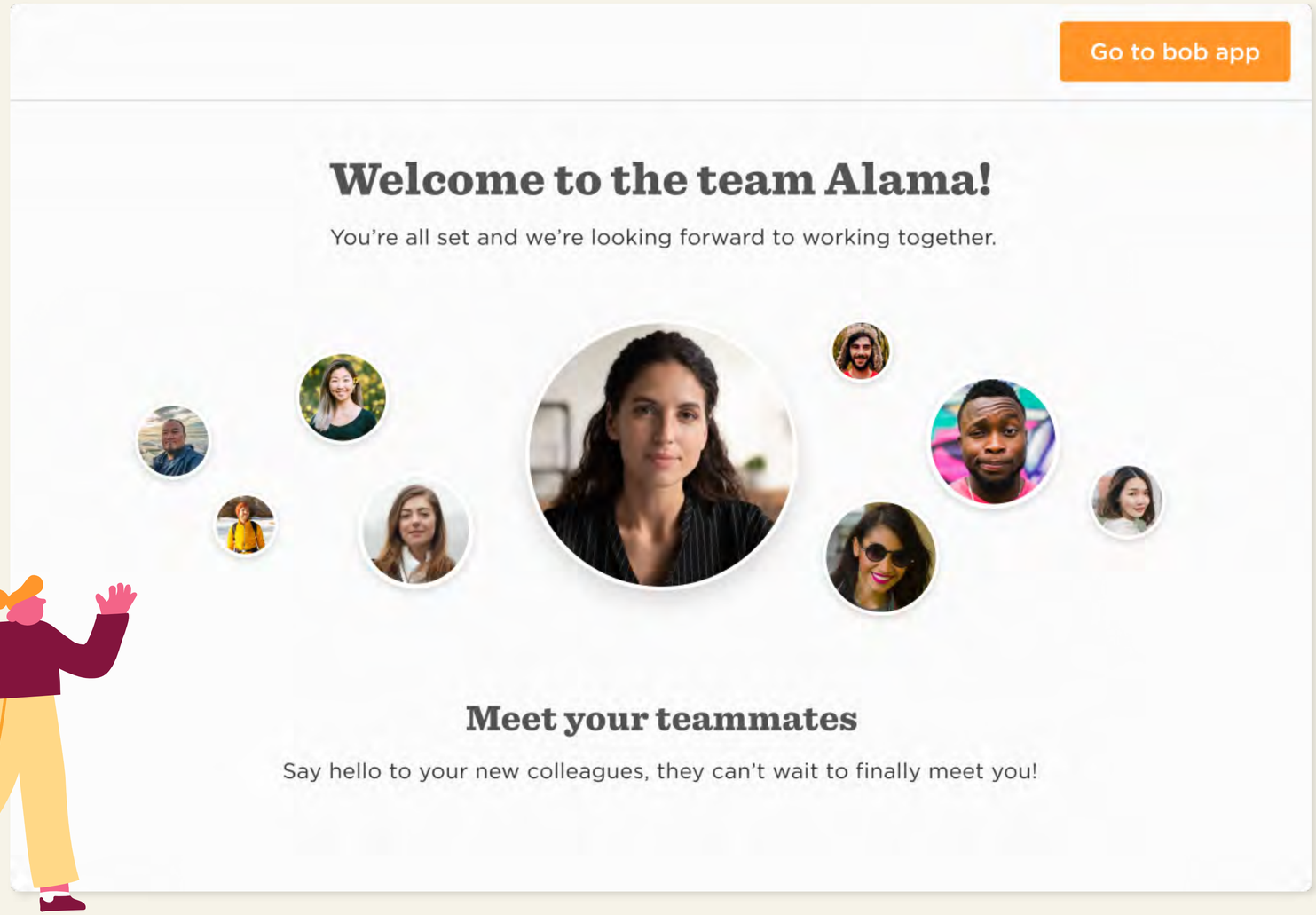
So what do you do? Easy—you rely on your tech stack and set up automated reminders and workflows.

As HR leaders, we have several innovative and helpful tools to help us do better work, mitigate human error, and increase productivity.

We created Task Lists in Bob to help you stay organized and significantly save time on administrative tasks. This allows HR teams to invest more time in vital people strategy and programming, ensuring your team feels more than just appreciated—they feel strategically supported.

This automation feature allows you to build chains of events where one action triggers the next. Just set it up, then kick back and relax, safe in the knowledge that you've got things covered without needing to rely on your memory or a bunch of scribbled-on sticky notes.

Read on to discover a selection of our top HR task lists, specifically built for supporting people-first cultures.

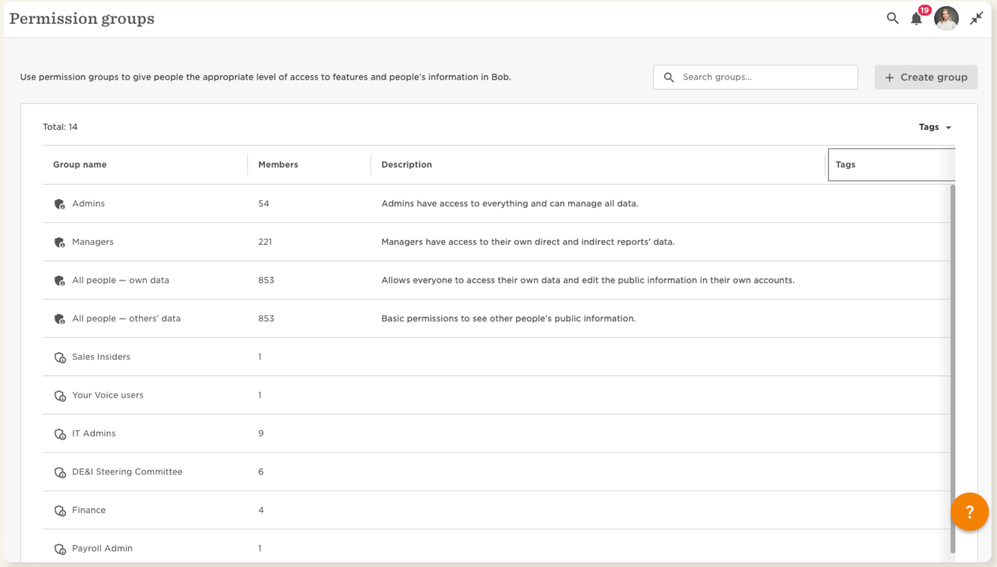

Go to bob app
Welcome to the team Alama!
You're all set and we're looking forward to working together.
Meet your teammates
Say hello to your new colleagues, they can't wait to finally meet you!

Get to know Bob's Task Lists

Bob's Task Lists are carefully designed to cater to a wide range of professionals across the business, from HR admins and managers to IT and people managers—and even individual contributors.

Here's how these lists stand out from the crowd:

- **Tailored for specific audiences.** Instead of a one-size-fits-all approach, Bob's Task Lists can be fully customized to address your people's unique needs and responsibilities. Whether that's an HR manager's list focusing on the overarching HR strategy or a team member's list centered around personal development goals.
- **Uncompromising on security.** You shouldn't have to compromise on data confidentiality to get the convenience of automating your HR processes. Bob's Task Lists and HR workflows ensure all your confidential information stays secure, with access rights only granted to pre-approved stakeholders.
- **Streamlined core HR processes.** Manual HR processes can be tedious and time-consuming. We designed Bob's Task Lists to offer an automated HR solution to these core HR challenges: onboarding, offboarding, compensation management, or anything in between.

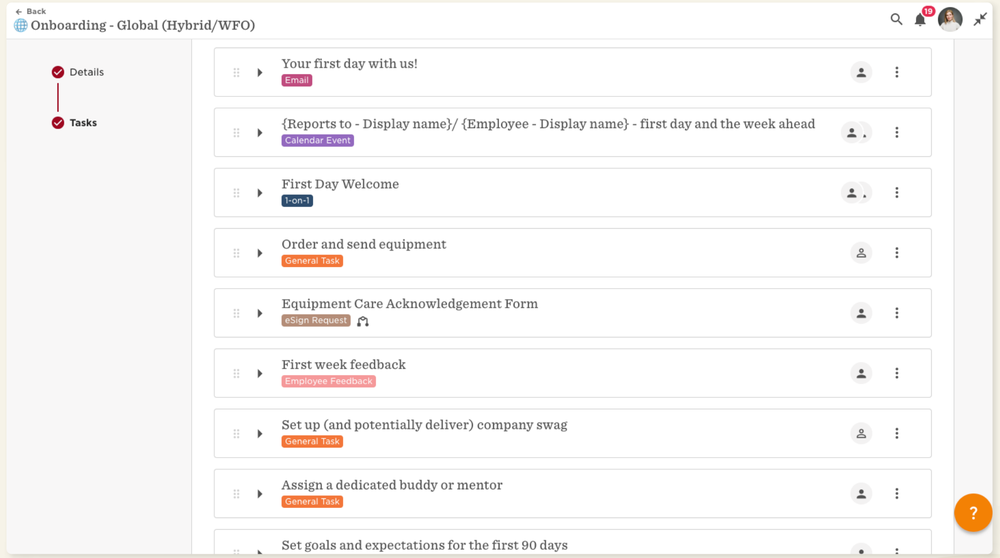


Unpacking the functionality of Bob's advanced Task Lists

Here's a deeper look at the functionality of Bob's Task Lists:

1. **Build comprehensive task lists and embed them in relevant workflows.**

   - **Customization at its best.** Bob allows you to create task lists that can be molded to fit any HR need. Whether you're looking to manage your recruitment, onboarding, or even team milestones, Bob has a structure in place to help.
   - **Seamless integration.** Once you create your tasks, you can easily embed them into your existing workflows. This means that the transition from one task to the next is nice and smooth, which allows you to avoid bottlenecks and delays.



2. Assign due dates, automate triggers, and set conditions

- **Precision timing.** With Bob, HR professionals can set specific due dates for tasks, helping to make sure everyone is always aware of their responsibilities and timelines.
- **Smart automation.** Instead of manually setting up tasks, Bob allows you to automate them based on specific events or milestones. For example, your new hire's onboarding process can automatically kick off as soon as their contract is signed.
- **Targeted assignments.** To ensure tasks are relevant, you can set conditions to make sure you've only assigned tasks to the appropriate person, group, or team. This means everyone only gets what's relevant to them, eliminating confusion and redundancy.

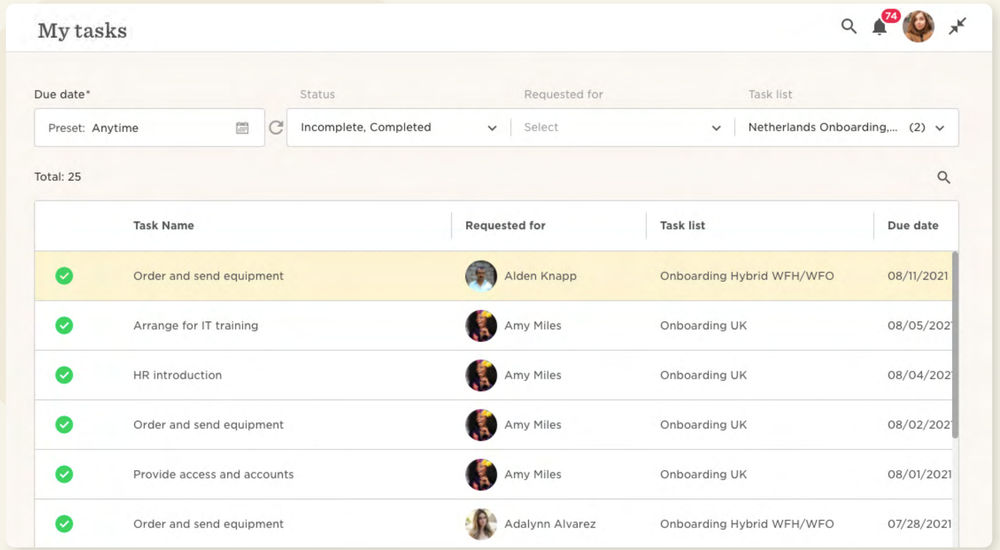
3. Preview from a team member's perspective.

- **Stay aligned.** Before fully rolling out a task or workflow, HR professionals can preview the process as if they're team members to ensure the experience is exactly what you intended.
- **Real-time refining.** If there's a mistake or discrepancy between your intended experience and the preview, you can make real-time adjustments quickly and easily. This allows you to ensure your tasks, teams, and organization can easily evolve and keep moving forward.

Bob’s HR Task List templates

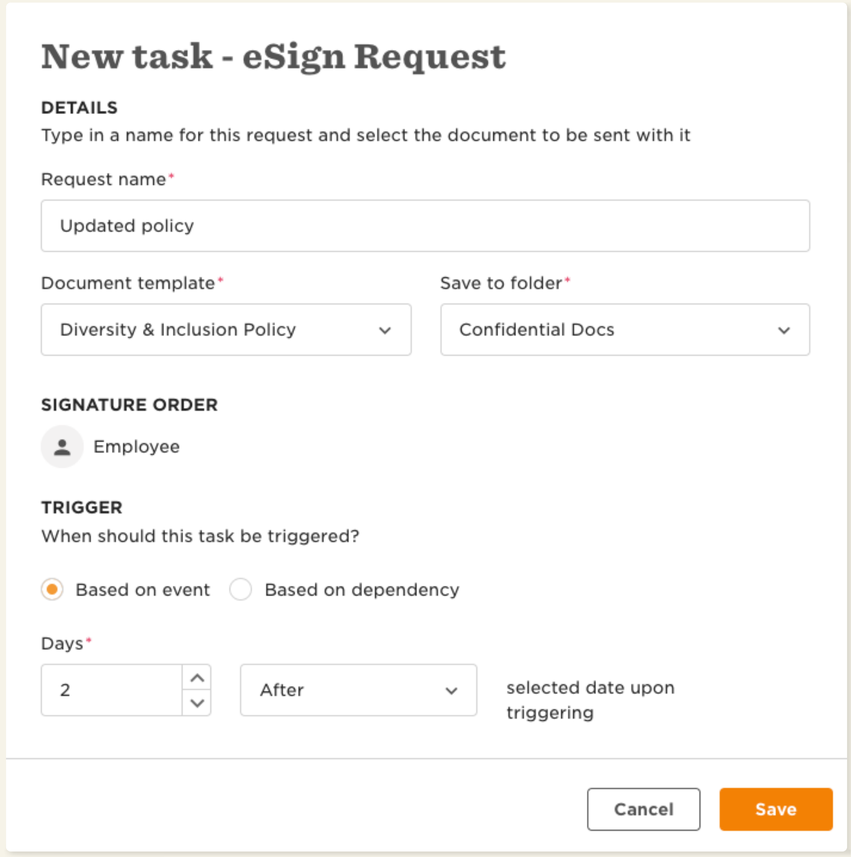
Bob offers a wide range of templates for various HR activities and enables you to create your own custom templates:

- **Onboarding.** Bob’s onboarding templates cover:
  - **Remote onboarding.** As businesses become more global and the workforce becomes more decentralized, remote onboarding becomes essential. This template helps to make sure every remote team member gets the same welcome and level of support as your office-based teams. It also facilitates coordination with various departments, such as IT, for equipment or SSO provisioning.
  - **Office-based onboarding.** Bob’s office-centric onboarding tasks guide HR professionals in providing a structured and memorable introduction to the company. Plus, they emphasize the importance of collaborating with other teams, ensuring new hires are set up for success from day one.

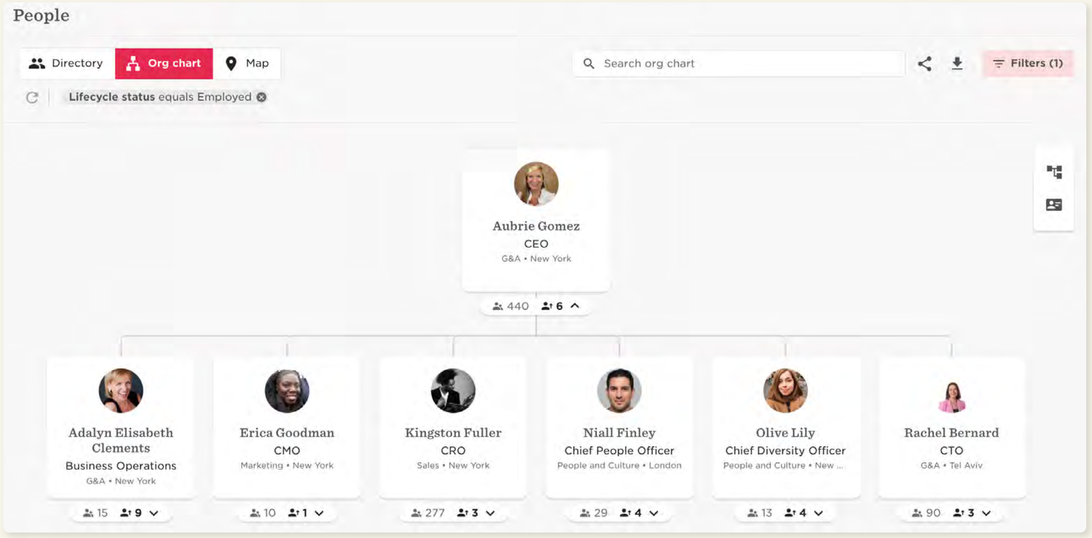


- **Offboarding.** The end of your team members’ journey is just as important as the beginning. Bob’s offboarding template helps you coordinate with line managers and other departments across the business, like IT, to be sure that nothing is missed and no data is compromised. This helps you provide your people with a smooth and respectful transition, ensuring they feel valued and respected right to the end.

- **Automating eSign requests**. Bob's template for eSign requests allows HR teams to effortlessly send, track, and manage electronic signatures, helping to streamline administrative tasks.

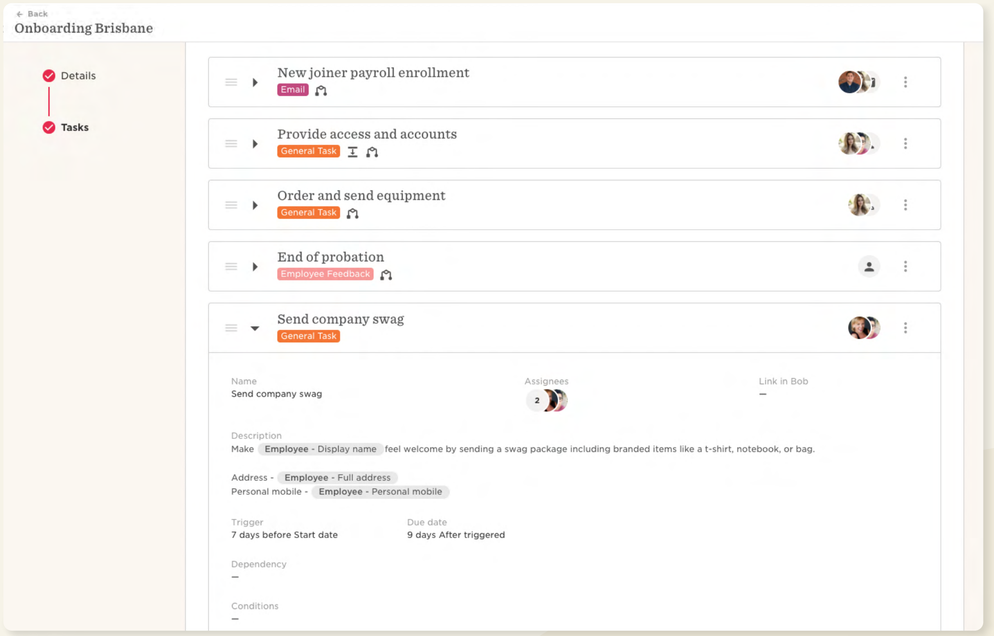


- **Team and individual milestones.** Recognizing your people's achievements helps to foster and reinforce a positive work culture. Milestone task lists are there to help teams celebrate these moments in a heartfelt way. You can also add personal touches, such as birthday greetings or work anniversaries, helping to promote a caring and personal culture.
- **Internal mobility.** As your people climb the corporate ladder or switch up their roles, it's important to make sure their transition is as seamless as possible. Use Bob's Task Lists to help you track, organize, and execute these movements seamlessly.



Create custom task lists for your organization

- **Specialized task lists.** Whether it's training sessions, performance reviews, updates like address changes, salary adjustments, or benefits distributions, Bob allows HR teams to create custom task lists tailored to their unique needs.
- **Geo-oriented task lists.** Multi-national companies often struggle to maintain consistent HR practices across their various locations. With Bob, HR teams can create location-specific task lists so each and every team can get a consistent (and locally compliant) HR experience.



Put more focus on your people with the help of robust HR tech and automation

In the modern workplace, the HR department has a huge role to play in developing and upholding your culture, ensuring that the values, mission, and vision of your company are lived and experienced by each and every team member.

Automation is a key tool for achieving this, helping to amplify HR's efficiency and impact. With rapid technological advances and a seemingly ever-growing list of responsibilities, HR leaders can harness the power of automation to help take the load off and focus on the teams' experience.

By setting up customizable task lists with Bob, you can keep your HR processes organized without endless reminders and sticky notes covering your desk.

Just imagine what you can do with all the time you'll save with HR automation.

Meet Bob

At HiBob, we've built a modern HR platform designed for modern business needs—today and beyond.

We focused on building something that is robust yet intuitive and easy-to-use, which has led Bob to be the platform of choice for thousands of fast-growing modern, mid-sized organizations.

For managers

It provides access to data and insights to help them lead more effectively and streamline processes.

For HR

It delivers **automation** of many common processes, allows greater oversight and visibility of the business, and centralizes all people data in a secure, user-friendly environment.

For employees

It's the tools and information they need to connect, develop, and grow throughout their journey.

In a short time, Bob can be deployed to enable communication, collaboration, and connectivity that drives stronger engagement, productivity, and business outcomes.

Now is the time to make smarter decisions when it comes to your people and organization

To learn more about HiBob and our data-driven tools, get in touch with us at contact@hibob.com

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