

How HR and Finance leaders use Bob for smarter planning and growth



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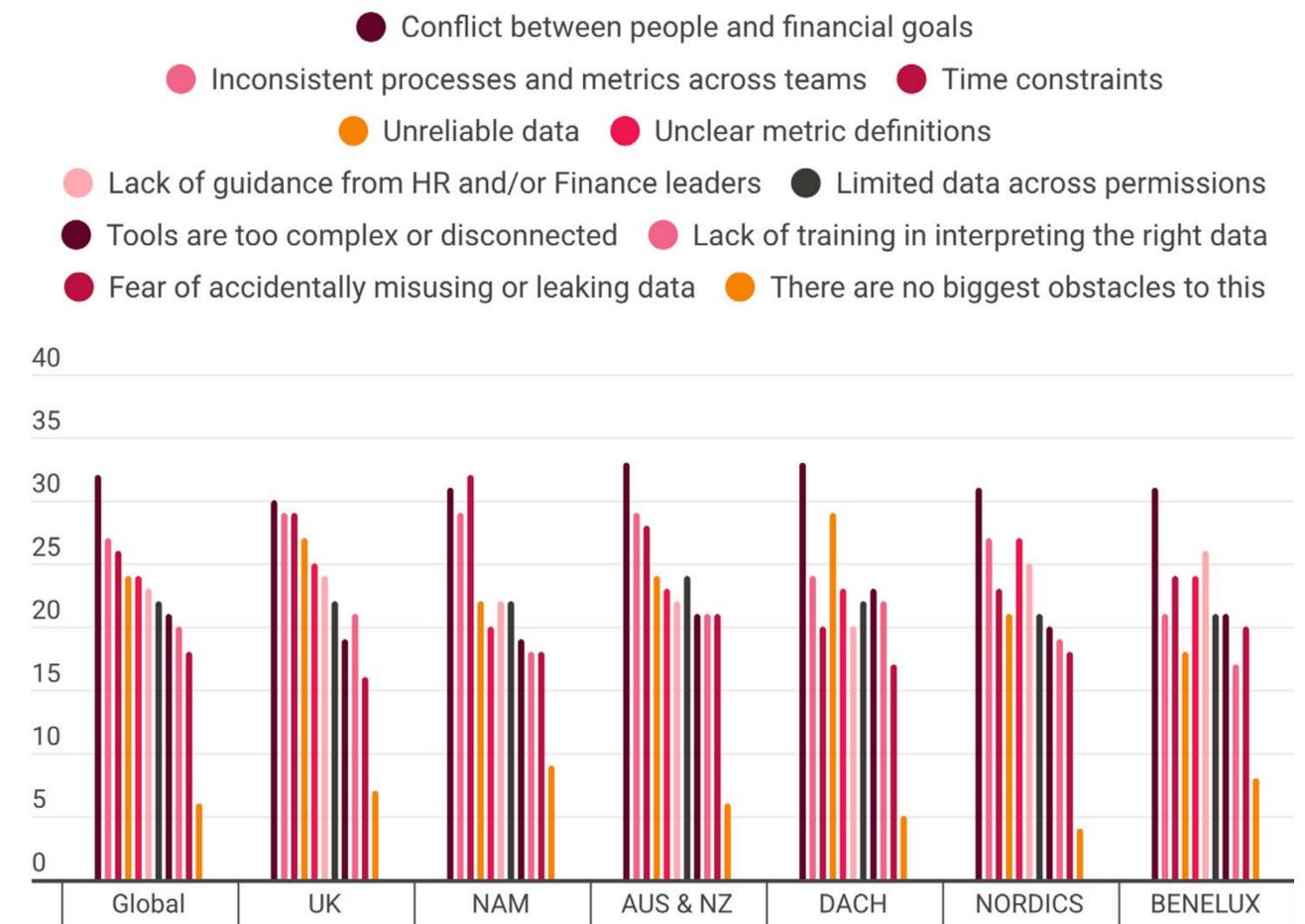
Introduction

While the relationship between HR and Finance teams once revolved around payroll and budget approvals, that’s no longer the case. In today’s business landscape, **CFOs and FP&A professionals serve as strategic business partners with HR, focusing on forecasting growth, driving operational efficiency, managing risk, and ensuring compliance.** To do that well, they rely on accurate, timely, and actionable people data from HR.

McKinsey research shows that CFOs are increasingly leading digital transformation projects, ESG initiatives, and enterprise-wide planning efforts—tasks that demand deep integration with HR insights on workforce costs, productivity, and performance.

However, a recent HiBob study, **Better together: HR-Finance alignment helps managers stay budget-smart and people-fair**, found that this alignment is often harder than it looks: **32 percent** of managers cite the conflict between people goals and financial goals as their single biggest obstacle to making fair decisions. (**Graph 1**).

Graph 1: What, if anything, are your biggest obstacles to making fair, data-driven people decisions? (Select up to 3)



FP&A teams, meanwhile, are moving beyond spreadsheets. They're expected to deliver fast, reliable forecasts. This involves consolidating data from HR, Finance, and Operations to support more informed workforce planning and budgeting.

To meet these expectations and work better together, HR and Finance need a shared view of the workforce. That means integrated processes, clean data, and real-time insights powered by HR tech that's built for today's pace of planning.

In this guide, we'll explore how Bob supports this evolving partnership with tools for collaborative planning, compensation management, compliance, and strategic reporting.



Why HR and Finance need enterprise software that works for everyone

In today's collaborative business environment, **choosing the right HCM** isn't just an HR decision. **It's a strategic investment that impacts Finance, FP&A, and HR alike.** For a platform to truly support the business, it must address shared goals, including smarter planning, greater efficiency, real-time visibility, and sustainable growth.

CFOs can leverage HR tech for more than just cutting costs. They're looking for solutions that simplify complexity, expedite planning cycles, and deliver accurate data for forecasting and compliance.

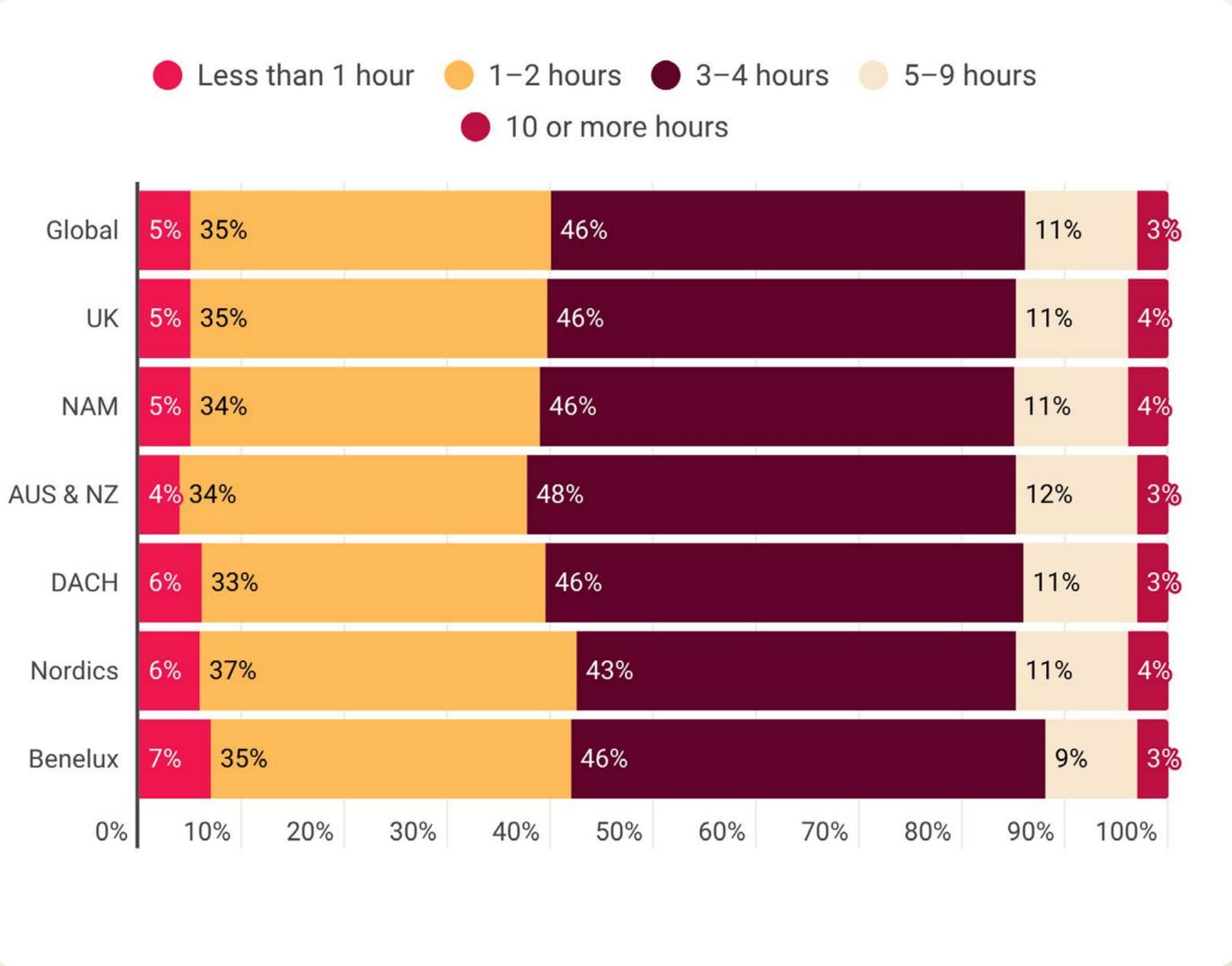
Predictable pricing models, automation of routine administrative tasks, and a fast return on investment (ROI) are all critical to making the case for any investment. The right HR tech delivers

on all fronts—streamlining operations, reducing risk, and giving CFOs the confidence to make smarter, faster decisions.

For FP&A teams, speed and accuracy matter. They can leverage a strong, unified system for more than just reducing manual work. System fragmentation is the enemy of this speed, with **83 percent** of managers saying that switching between tools slows them down at least half the time they make a decision.

But organizations can use **HR tech** to directly connect people data to financial plans, expedite cycles, and deliver accurate forecasting and compliance data. Bob's HR software for Finance and HR leaders offers a single source of truth, supporting everything from headcount planning to compensation modeling and variance reporting (**Graph 2**).

Graph 2: On average, how much time do you spend assembling data across systems before making people decisions?



For HR leaders, simplifying complex people operations, such as compensation changes, headcount planning, and policy updates, enables them to focus on the strategic work that drives business alignment.

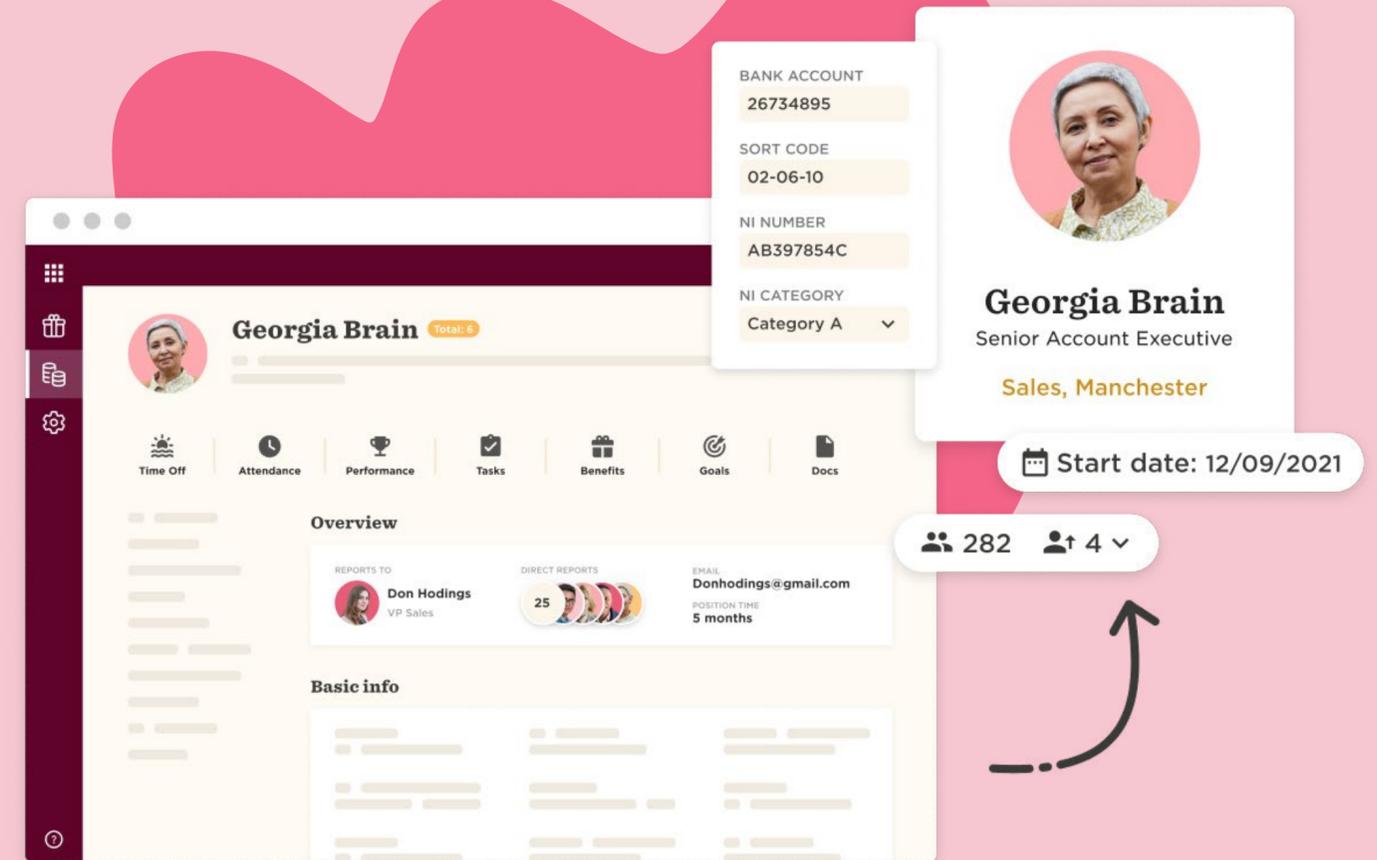
By maintaining accurate org structures, tracking workforce movements, and managing compensation frameworks with clarity, HR can respond quickly to business changes, support better planning conversations, and keep teams aligned as the company scales.

All-in-one HR platform

Bob, the HR platform from HiBob, enables everyone in the company to work simultaneously, resulting in a transformative impact.

HiBob customer Uala, a global fintech company with more than 1,400 employees, unified its operations in Bob and **achieved a 405 percent ROI**, recouping its investment in under three months.

HiBob customer James Solomons, the former CFO/COO of **Xref**, said, **“As the CFO, you’re managing most companies’ largest investment, and that’s an investment in our people. So, I needed the platform that we chose to really focus on giving us the best view of how our people are. When we looked through all the different options, it really came down to a couple of key aspects. Certainly, it needed to integrate with our current solutions in the HR space, including payroll, and it really needed to be customizable to our needs.”**



The shared **value of HR tech** is clear: faster decision-making, better forecasting, and scalable operations. For any team involved in planning the future of the business, **an all-in-one HCM like Bob becomes a platform for progress, not just process.**

Technology like this is key to helping teams work better together.

Data and analytics: From siloed systems to shared insights

Data should drive decisions. But in many companies, HR and Finance teams still operate in silos, working from different systems that limit collaboration and delay insight. When workforce insights are scattered, outdated, or hard to access, it slows down planning and makes it harder to align across functions. HR analytics help close that gap.

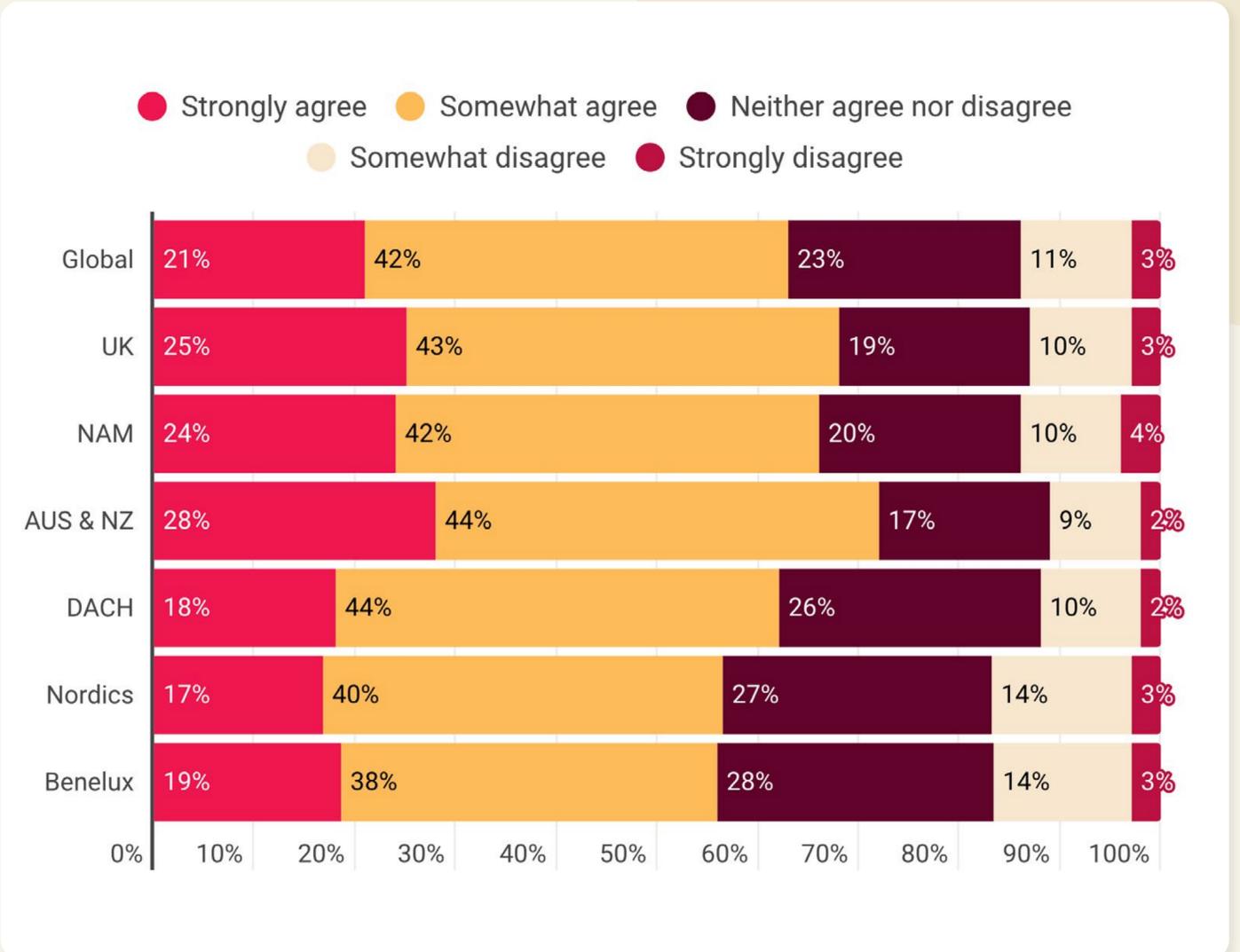
For CFOs and FP&A teams, **HR analytics** provide vital inputs for workforce forecasting, headcount modeling, and productivity analysis, making HR and Finance collaboration easier and more strategic. With visibility into attrition trends, compensation costs, and hiring velocity, Finance teams can plan with more confidence and less guesswork.



Standardization is key to this confidence, as **63 percent** of managers worry that similar roles are evaluated with different **metrics** across teams, making company-wide planning difficult (*Graph 3*).

For HR leaders, data and analytics provide the data accuracy and structure needed to support faster, smarter planning. Instead of relying on gut instinct or disjointed spreadsheets, HR can provide up-to-date insights into headcount, compensation trends, and hiring velocity, core inputs for financial forecasting, scenario modeling, and business performance analysis.

Graph 3: I worry that similar roles are evaluated with different metrics across teams



People analytics in Bob

Bob's People Analytics brings all of this into one place. With customizable dashboards and visual reporting, Bob helps HR and Finance teams work from a shared set of real-time insights, removing data silos, streamlining reporting, and enabling faster alignment across functions.

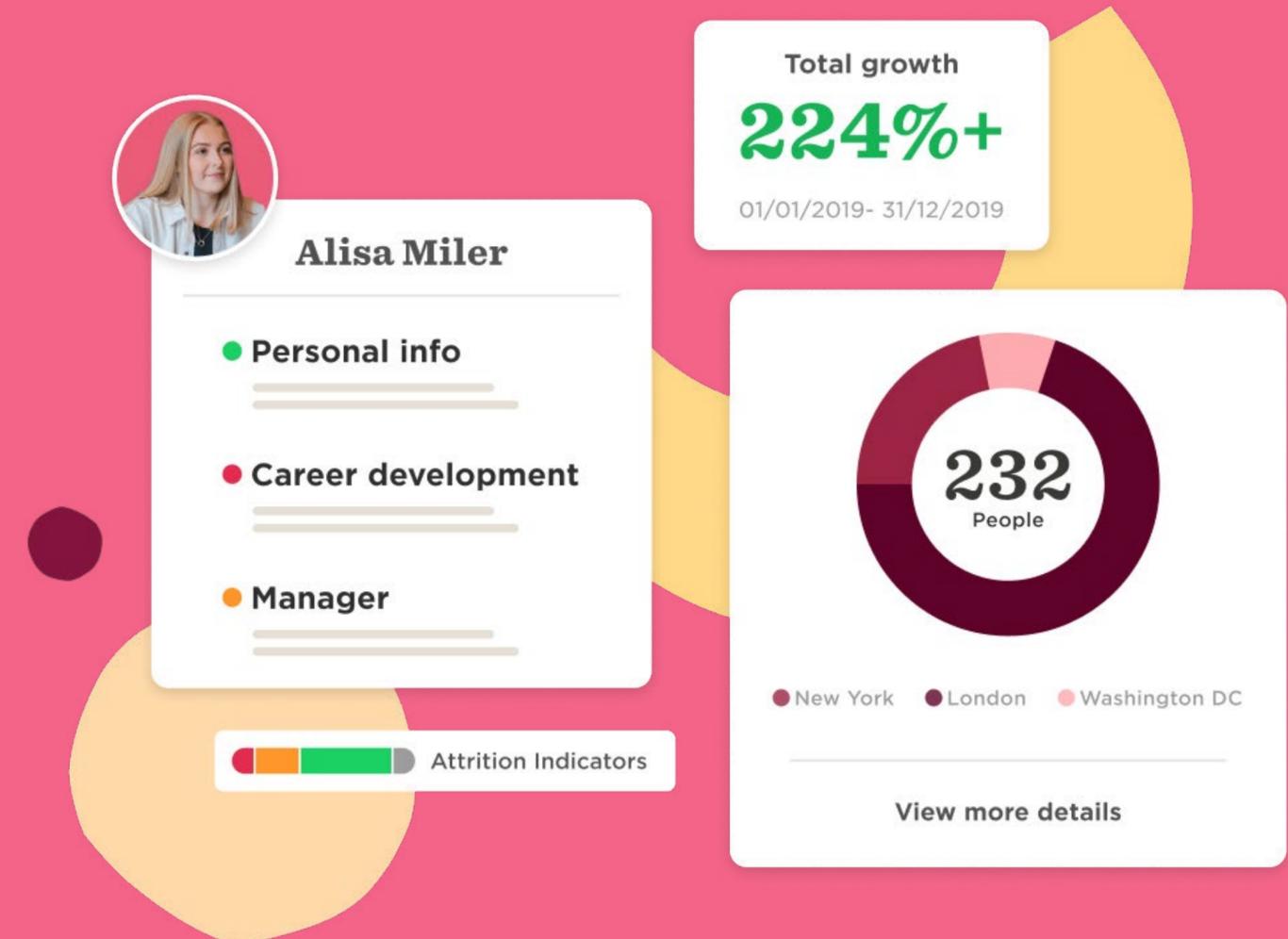
With Bob, teams no longer spend hours compiling reports or searching for data across multiple systems. Instead, they can focus on what matters most: making informed decisions that move the business forward.



My manager is the CFO/ COO. He is big on metrics. He wants to know headcount, how many contractors, how many full-time workers—by site, by department, and by division. What are the open roles, and who did we hire that didn't start yet, so he can forecast the headcount. He is big on headcount, that's our runway. How much money do we have, what is our average salary, what is the burn rate. With Bob, I can very easily provide him with this information.

Bob's reporting tool is great, and I love that I can download all the fields. I always want to look at data in different ways—division, department, site, length of service, by manager ... I look at turnover in many different ways. Without Bob, it would be very difficult. Relying on the accuracy of the data is the core.

Inbar Dayan | Global VP People, **BigID**

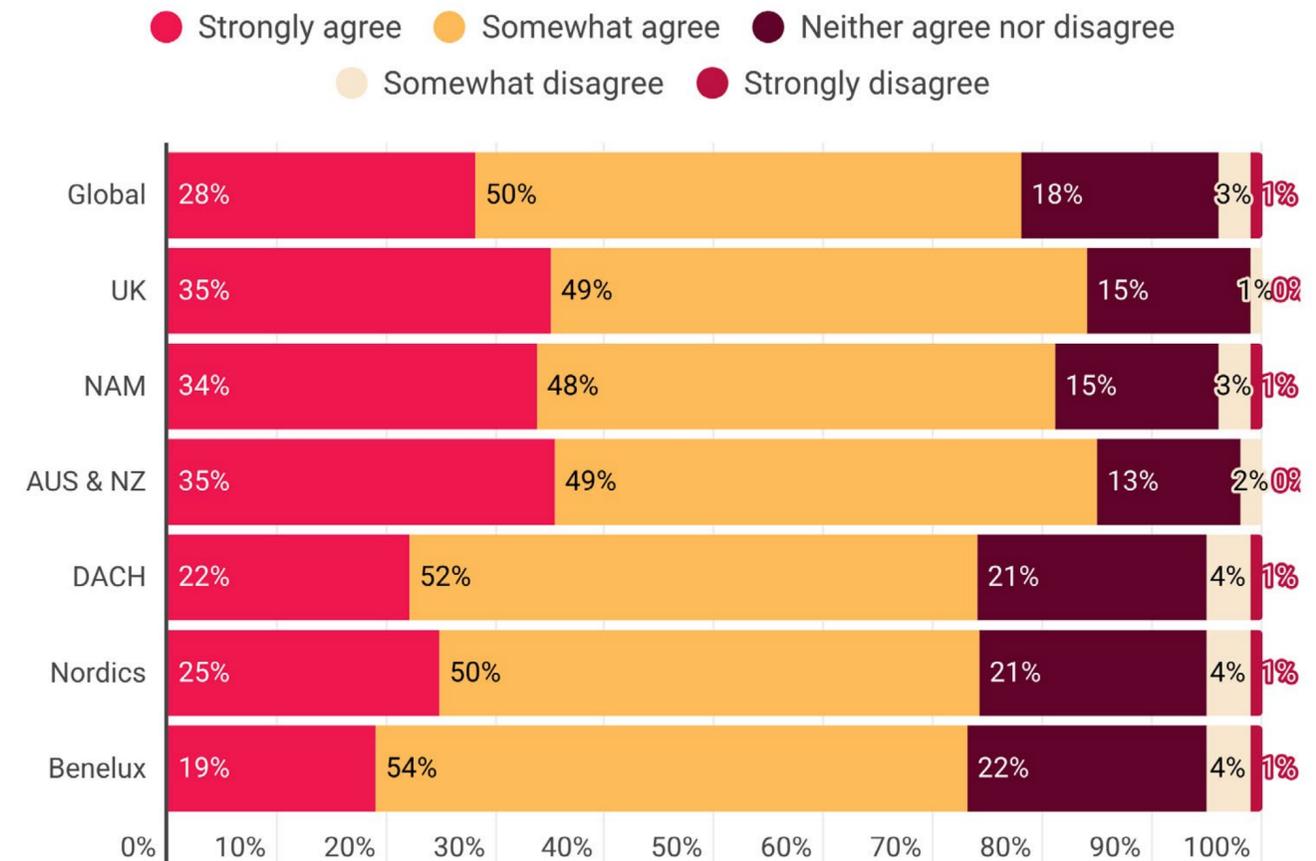


Reporting built for the boardroom and the balance sheet

For companies preparing for IPO or scaling toward enterprise standards, board-level reporting and audit readiness are business-critical. The HR and Finance teams both play a role in delivering accurate, consistent, and strategic people data. However, **when systems are disconnected or processes are manual, even routine reports can create friction. Teams need a centralized, compliant source of truth they can trust.**

CFOs and FP&A teams must provide clear answers on headcount, compensation, DE&I, and workforce structure. When data is siloed or outdated, reporting becomes a scramble, slowing down forecasts and increasing risk. Finance needs complete visibility into people costs and planning inputs to support strategic decisions and board requirements with confidence.

Graph 4: With unified data, I would feel more confident defending my decisions in a pay-transparency or legal context



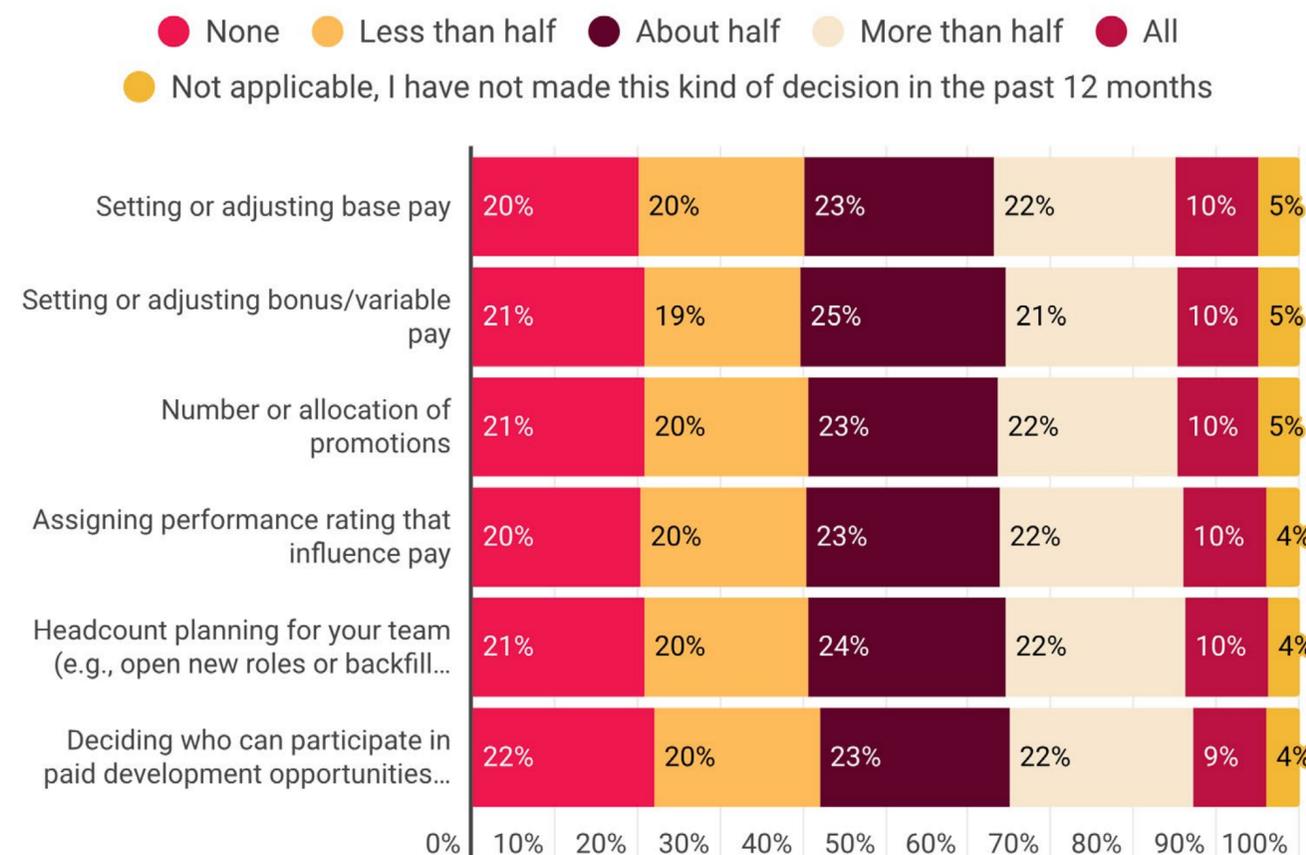
This visibility directly reduces risk. Our research shows that **79 percent** of managers say that unified HR and Finance data would make them more confident defending their decisions in a legal or **pay-transparency** context (*Graph 4*).

HR leaders manage the moving pieces, including organizational changes, compensation adjustments, and compliance data. However, **without the right tools, providing audit-ready reports often means chasing approvals, sifting through spreadsheets, and wasting time.** This lack of data integrity creates churn. Roughly three-quarters (**76 percent**) of managers report that at least some of their people decisions were formally challenged or appealed in the last year (*Graph 5*).

HR needs structured, scalable workflows to support governance and respond quickly to stakeholder requests.



Graph 5: In the past 12 months, what proportion of your decisions in the following areas, if any, were formally challenged or appealed?

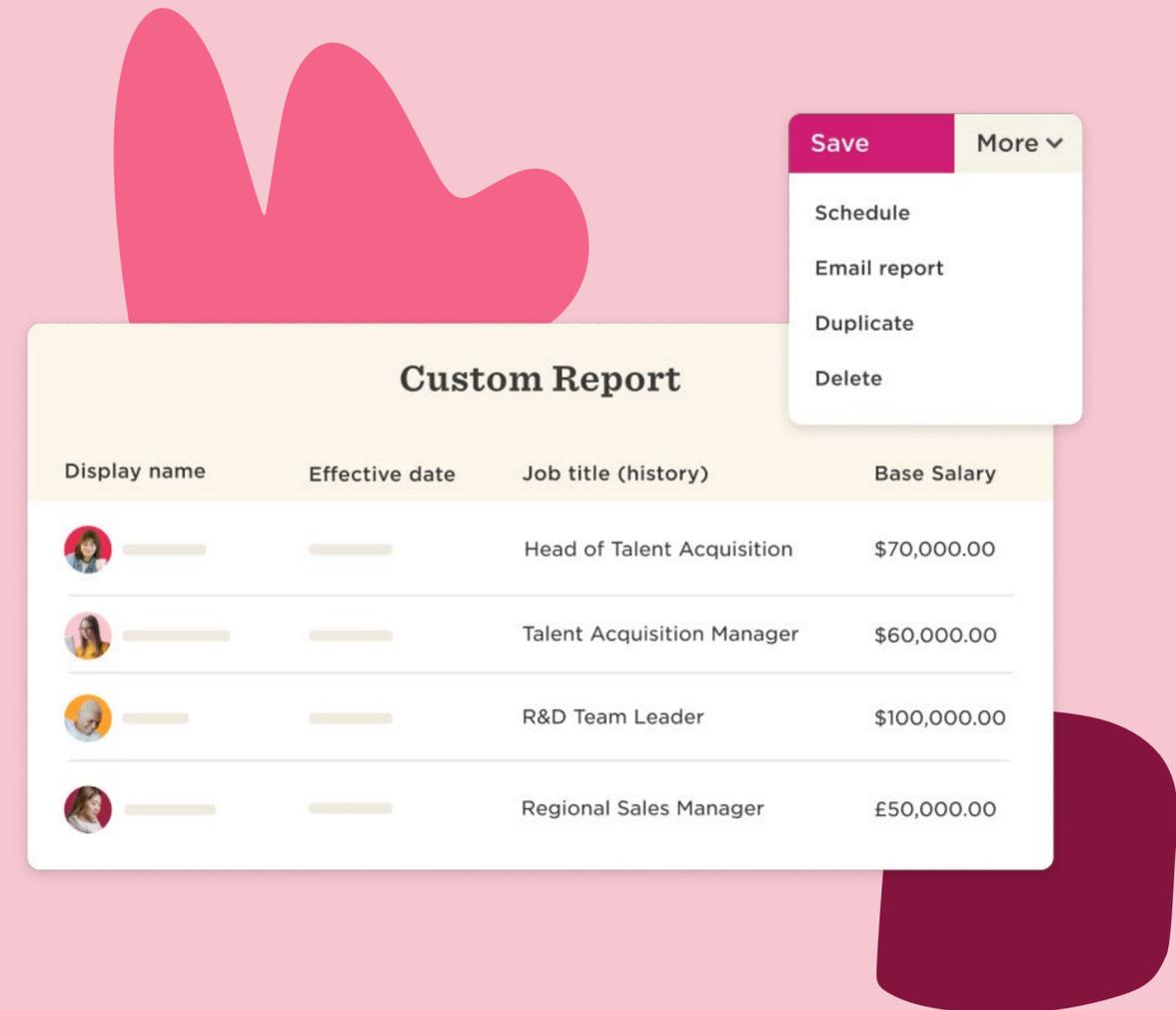


Reporting in Bob

Bob's People Analytics streamlines reporting across HR and Finance by centralizing data, **automating workflows**, and offering intuitive dashboards that are easily customized and shared. Whether you're answering questions from the board, preparing for a funding round, or ensuring compliance, Bob helps deliver accurate insights in just a few clicks.

Sharon Steiner, CHRO at **Fiverr**, explains, **“As a publicly held company, I need to present HR data every quarter to the compensation committee and the Board. Bob makes it simple, providing all of the data that I need in an easy-to-understand format.”**

Vita Mojo, a growing tech company, needed HR operations and reporting to support their IPO goals. With Bob, they centralized processes, automated workflows, and gained the visibility they needed to meet governance requirements and prepare for future public reporting.



My Finance and Strategy Director asks me all the time, 'Can you pull up this?' 'Can you pull up that?' 'Do you have any dashboards for this?' Because going through a series round funding, that's when the CFO cares and is also very much involved. And at the year-end, when things become greater, I get asked, 'What is the cost of the hire?' 'What did we spend this quarter?' 'What is our target headcount?' Why spend a million hours on an Excel spreadsheet figuring that out? Because ultimately Bob offers an easier way for Finance and People teams to collaborate.

Karthika Baiju | former Head of People, Vita Mojo

When HR and Finance operate from a single source of truth, it's easier to build the confidence and control required at the enterprise level. Whether you're planning to go public or are already listed, Bob helps teams deliver board-ready reporting without the scramble.



Make comp planning faster, fairer, and audit-ready

Compensation planning is one of the highest-impact opportunities for HR and Finance to collaborate. It touches budgeting, employee experience, and compliance, and it's often one of the most complex, spreadsheet-heavy processes in the business. Without integrated systems, it's time-consuming, hard to track, and risky to scale. **However, with the right approach, compensation planning can become a strategic strength for the entire business.**

Finance and FP&A teams must ensure that every compensation cycle is within budget and aligns with financial targets. However, when data is scattered across spreadsheets or siloed in systems that don't communicate with each other, monitoring spend, validating proposals, and forecasting costs become inefficient and prone to error. Integrated comp planning provides Finance

with the visibility and control they need to model scenarios, identify risks early, and ensure decisions align with business goals.

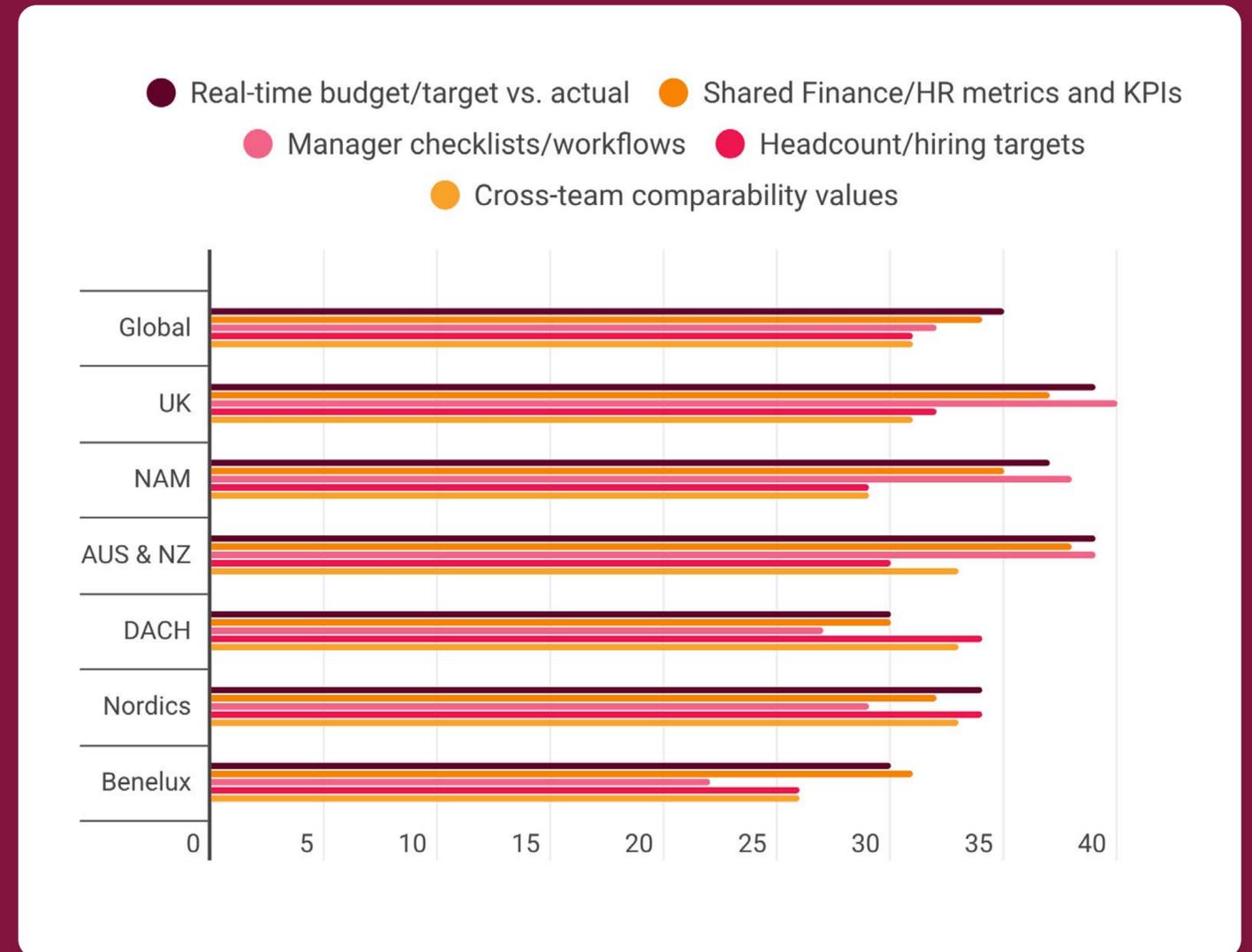
For HR leaders, running a fair and scalable compensation cycle means striking a balance between equity, performance, and market trends without getting bogged down in administrative tasks. When processes rely on manual inputs, HR spends more time chasing approvals than driving strategy. With structured workflows, data-rich insights, and real-time visibility, HR can lead with clarity, move faster, and build trust in the process.

Compensation in Bob

Bob's **Compensation Management** makes comp planning easier and more strategic for every stakeholder. Finance can track budgets in real time. This is exactly the visibility teams are asking for.

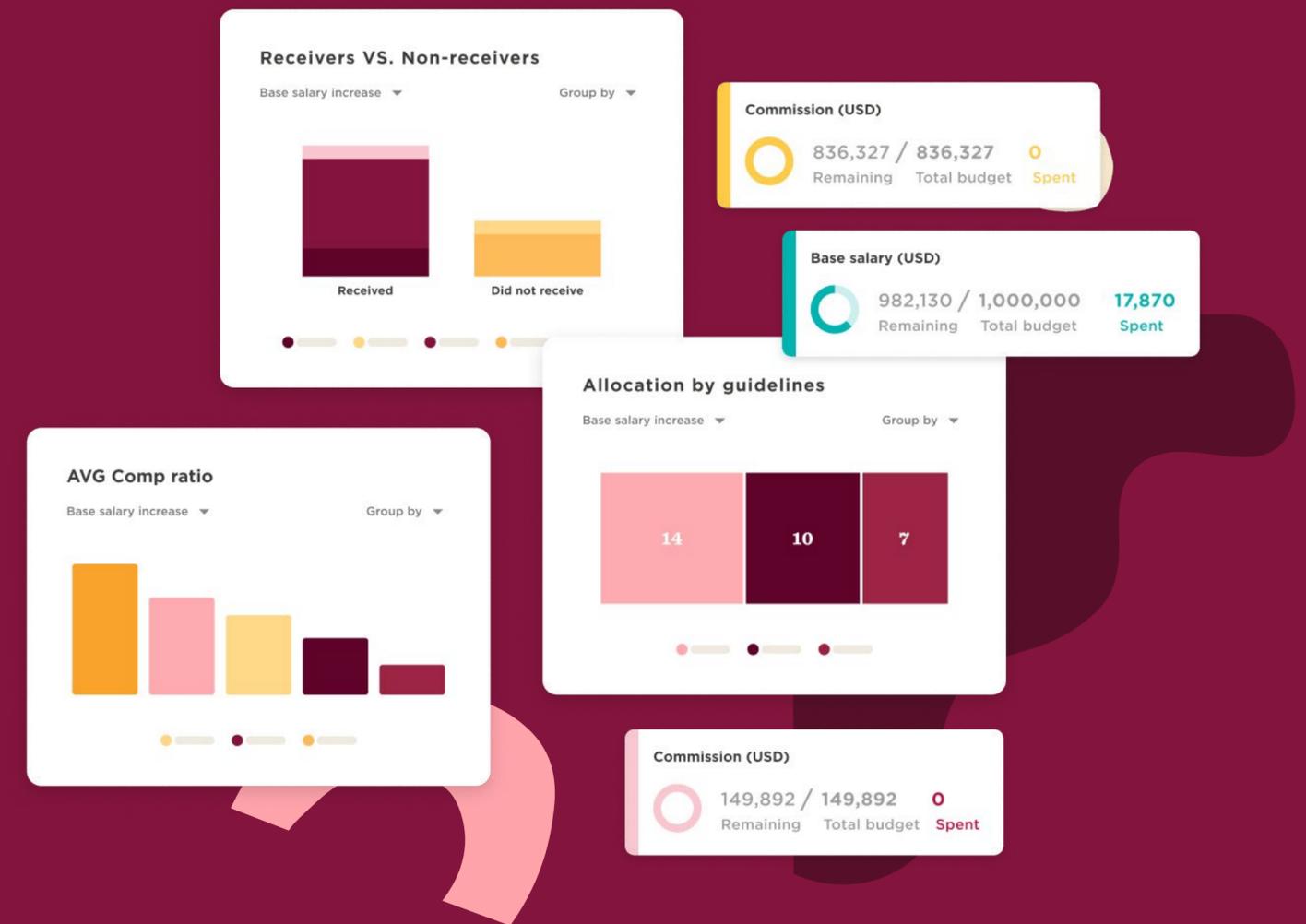
Real-time tracking of budget targets vs. actual is the number one feature managers request for a shared HR-Finance dashboard. HR can manage structured cycles with built-in guardrails. Managers can make decisions based on clear guidelines and live data (**Graph 6**).

Graph 6: Global Top 5 responses to “To be effective, a single, shared HR+Finance dashboard must offer ...” (Select all that apply)



Bob also supports global operations with localized workflows and multi-currency flexibility, which is ideal for scale and governance. And with full audit trails, public or IPO-bound companies can meet compliance requirements with confidence.

Every stakeholder sees the same picture—no back-and-forth over spreadsheets or unclear approvals. The result is a faster, more transparent cycle that supports internal equity and business performance.



Skroutz, a leading Greek e-commerce platform, utilized Bob to overhaul its compensation process as it scaled.

“It was very easy to set up the compensation cycle in Bob, and HiBob gave us great support. It was the most stress and hassle-free compensation cycle that we ever had and was a great experience.”

Roza Tapini | former Head of People Operations, **Skroutz**

When HR and Finance collaborate in a single system, compensation cycles become strategic levers for engagement, planning, and performance, aligned with the company’s financial goals and built for scale.

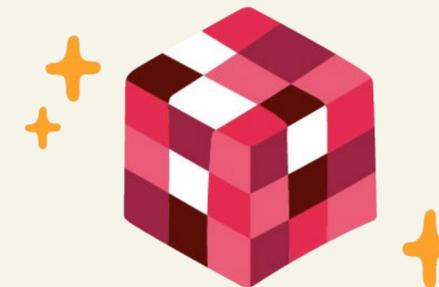


Plan better, together: Align people strategy with financial goals

Workforce planning sits at the intersection of strategy, finance, and execution. When HR and Finance plan together, they can align hiring, headcount, and budgeting decisions with company goals. However, without a shared system, planning becomes reactive, disjointed, and fraught with friction. To plan proactively, teams need to work from a single source of truth—one that connects **people data** to financial realities.

For FP&A teams, effective workforce planning requires clear inputs: current headcount, future hiring needs, compensation forecasts, and geographic distribution. When these inputs are buried in spreadsheets or delayed by manual processes, it limits agility and accuracy. With integrated data and collaborative tools, Finance can model various scenarios, assess risks, and create dynamic forecasts that adapt to changing business needs.

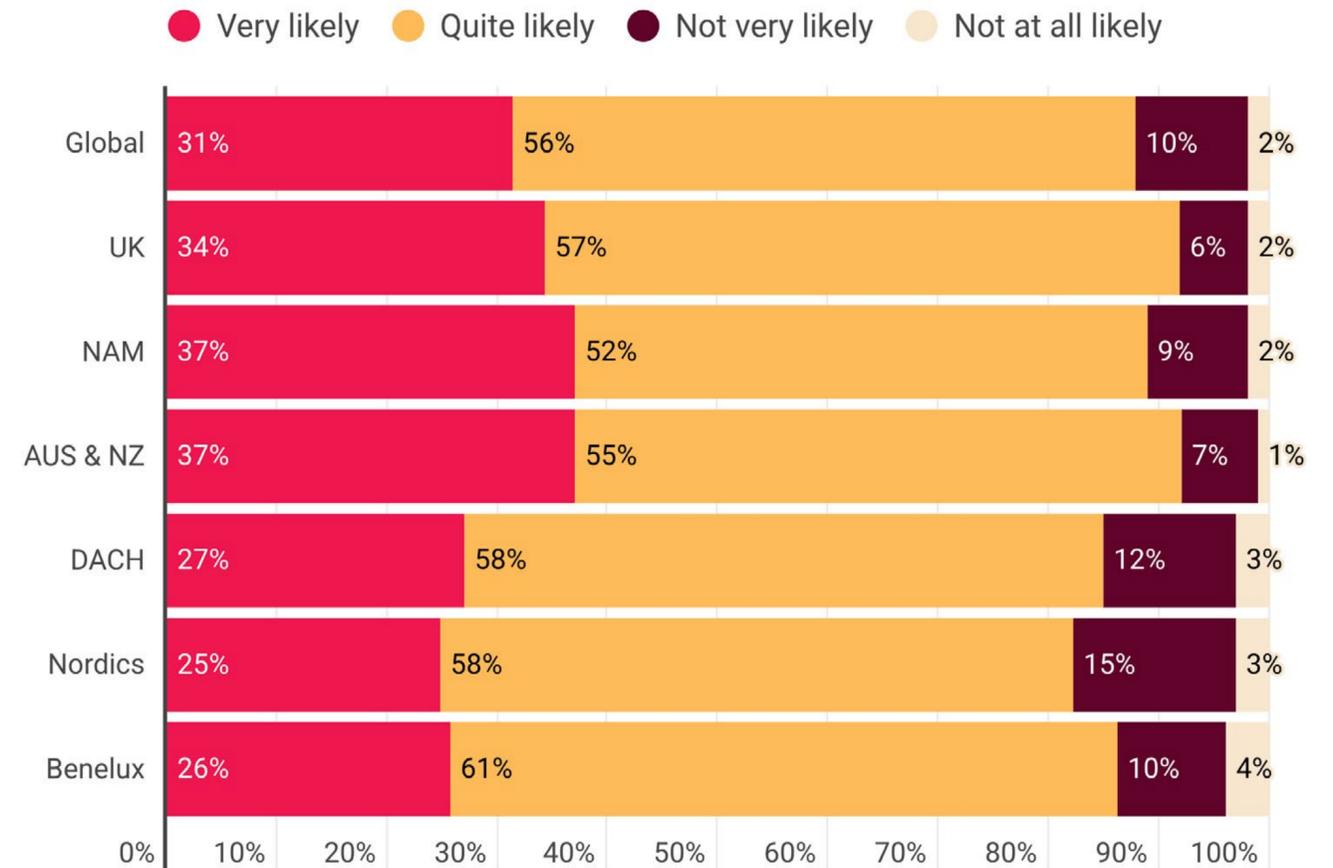
HR teams bring essential context to planning: growth needs, talent pipelines, organizational changes, and people costs. But when HR works in isolation, those insights often get lost in translation. With the right system, HR can provide Finance with live updates on organizational structure, hiring plans, and internal movements, fueling more strategic, data-driven decisions at every level.





Teams are ready for this evolution. According to our research, **87 percent** of managers say they would welcome an AI companion to summarize HR and Finance data to help them make better decisions. (*Graph 7*).

Graph 7 If an AI companion summarized your team's HR+Finance data and made recommendations on people decisions (e.g., pay, promotion, or development opportunities), how likely, if at all, are you to use it?



Workforce planning in Bob

Bob's Workforce Planning provides HR and Finance with a shared platform for planning the future. HR can track hiring needs by department or location. Finance can run real-time impact analyses. Together, teams can develop scenario-based plans that adapt to market shifts, funding rounds, or growth goals. Bob's centralized planning tools help break down silos, reduce errors, and align people strategy with financial discipline—so your business can move with confidence.

“When you work in a matrix multi-country company, processes get complicated. So you need a tool that will help you.

***Bob's Workforce Planning module** will allow us to change from a fast hiring company to a more optimized view of growth.”*

Diego Soleira | Chief People Officer, **Uala**



Add position

Filled by	Status	Position title	Department	Recruitment
	Filled	=====	R&D	Open
	Canceled	=====	R&D	Open
	Vacant	=====	R&D	Open

This kind of partnership isn't just efficient—it's essential for scaling. When workforce planning is powered by a single system, it becomes a shared advantage. HR brings people insights. Finance brings financial discipline. And together, they create a plan the business can count on.

One platform. Shared goals. Smarter business decisions.

In today's fast-moving, resource-conscious business environment, HR and finance can't afford to operate in silos. Their goals are interconnected: Hiring impacts budgeting, compensation affects retention, and workforce data fuels planning. And yet, many teams still rely on disconnected tools, delayed insights, and manual workarounds to make critical decisions.

That's where Bob comes in.

As a **modern HCM**, Bob is built to support cross-functional collaboration between HR, CFOs, and FP&A. It helps teams unify workflows, automate time-consuming processes, and share real-time people data that drives confident, strategic decisions.

Whether you're managing compensation, preparing for an IPO, or building integrated HR and finance systems for the future,

Bob gives your teams a single source of truth and a shared advantage. It's not just about HR tech. **It's about building a better business, together.**



Meet Bob

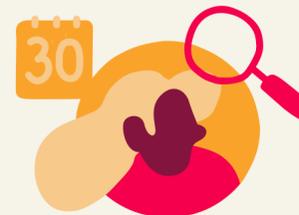
At HiBob, we've built a modern HR platform designed for modern business needs—today and beyond.

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

SCHEDULE A DEMO



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