


From onboarding to performance management: enhancing the Kustomer experience



Kustomer is a customer services industry disruptor, providing agents with a holistic, unified customer view and consumers with a seamless and personalized experience that focuses on people rather than ticket numbers. Headquartered in New York City, Kustomer has grown considerably during the past several years, more than doubling its headcount. As part of this growth, the company opened an additional office in Durham, North Carolina, and acquired a company, onboarding their development team based in Spain. They also started hiring remote employees from across 23 US states, enabling them to cover various time zones.

Kustomer works with a payroll and health benefits platform, but it was limited in supporting their new global structure. Kustomer needed to implement a full-service HRIS to help them scale and support their HR team with additional tasks such as performance management and onboarding. They chose bob.

	Founded in 2015	What they do Customer relationship management (CRM) platform
	Headquarters New York City, NY	In a nutshell Kustomer is a customer experience CRM platform that personalizes the customer service journey while effortlessly managing high support volume. Kustomer enables companies to deliver seamless, consistent, and personalized service through a single timeline view.
	Employees 250	
	Sites 3	



“There are many platforms that specialize in one specific area of HR, whether performance or onboarding. We wanted an innovative platform that did a bit of everything, supported our overall goals, and would grow with us.”

Alyssa Henriques
Senior Manager, People Operations at Kustomer

Onboarding new hires was a mountain of paperwork

Preboarding and onboarding at Kustomer was an impersonal process focused on collecting new employees' personal information. The process was very time-consuming and paperwork-heavy, managed using manual checklists that HR created for each new employee in Google Sheets and a series of emails to the new hire. New hires completed their tasks but didn't have the opportunity to learn about their new workplace before their first day. Kustomer's HR wanted to streamline the onboarding process to ensure that no detail would be overlooked and provide a smoother, more personalized onboarding experience for their new hires.

Creating a more personalized onboarding experience

Kustomer now uses bob's onboarding workflows to ensure the very best onboarding experience for their new hires. Starting with preboarding, Kustomer has set up automated tasks for all relevant stakeholders covering every detail—from IT organizing new equipment to the hiring manager welcoming them to the team.

Before their first day, all new employees are introduced to bob as part of their preboarding. During this initial interaction with bob, they can learn more about Kustomer's culture by reading the company values, viewing company photos, and looking up other team members. On their first day, Kustomer's HR uses information from the employee's profile to publicly welcome new hires to the company. They also record their pronouns in bob to ensure a more inclusive environment. Additional data from bob, such as each employee's start date, define when they receive their annual training—making bob the single source of truth for all employee data.

Enhancing the employee review process

As a smaller company of 100 employees, Kustomer managed their performance reviews once a year using Google Docs. However, as the company grew and doubled in size, it was clear that this method was not scalable. They wanted employees to have the opportunity to receive written feedback more often and enhance the process beyond the manager/employee reviews that they were conducting.

Running 360-degree performance reviews with bob

Using bob, Kustomer runs 360-degree performance reviews, including collecting feedback from employees, peers, managers, and subordinates, to gain a more inclusive and holistic view of their people. In place of the Google Docs that they had used previously, everything is managed and automated in bob.

bob also gives stakeholders access to employee data such as the employee timeline, which documents their history, achievements, and goals, and helps them evaluate the employee more objectively. Running performance reviews in bob has enabled Kustomer to enhance the entire process and has helped them scale.

Accessing data for meeting company goals

Kustomer is very serious about their employee data. They have goals and KPIs and are invested in measuring and understanding their growth and development. However, once they expanded into Spain, they saw that their previous US-based platform could not support them. Kustomer needed a platform that would support their global workforce and provide them with easy-to-understand people data.

Measuring KPIs with bob's people analytics




Kustomer's HR team now seamlessly pulls people data across their sites in just a few clicks, including full-time employees, part-time workers, and external contractors. bob provides HR with data on all of their KPIs, such as overall headcount per department or site, employee turnover (voluntary or involuntary), and compensation. They can also simply view their progress regarding specific company goals and individual goals.

Kustomer has also created custom fields, such as team fields and role fields, which provides them with a view of each team and team structure—something they were unable to do before. With this data, Kustomer's HR can quickly identify role or knowledge gaps within teams. All people data in bob is easily displayed in a choice of formats and graphs without importing them into Google Sheets, providing an easily understandable and visual representation of where the company is headed.

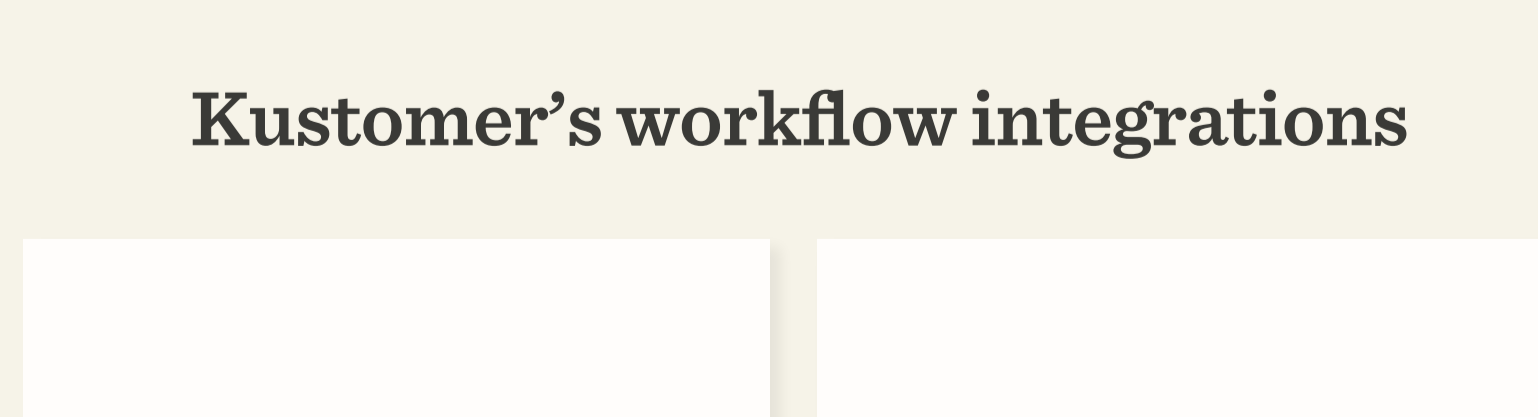
Main takeaways:

- With bob, Kustomer moved from manual checklists to automated onboarding flows, improving the employee onboarding experience.
- Kustomer can now run 360° performance reviews for their employees using bob.
- Kustomer likes bob's pronoun field, which enables them to be more inclusive.
- bob's people analytics help Kustomer's HR to track their KPIs easily.

Kustomer's favorite bob features

 <p>Onboarding</p> <p>Make a great first impression for your new hires</p>	 <p>Performance</p> <p>Run review cycles and set actionable goals</p>	 <p>Reports</p> <p>View insights and track people analytics trends</p>
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Kustomer's workflow integrations



“We knew we were growing and were looking for a platform that would help us streamline and onboard for the employee and enhance the employee experience.”

Alyssa Henriques | Senior Manager, People Operations at Kustomer

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