The HR automation toolkit





Automation is bringing humanity back to HR

Consider this: On average, HR employees spend <u>40%</u> of their time on administrative work.

So how do we untether our teams from admin and free them up to focus on the human parts of HR?

Ironically, the answer lies in not-so-human automation.

Now, you've probably heard about the promises of automation: faster hiring processes, better candidates, etc. But why automate now?

As Enrique Rubio, Founder of Hacking HR, says, "Digital transformation has been accelerated over the past 12-to-14 months. And that means that not only are more technology tools available, but that there's also an appetite to use more technology to optimize HR processes."

And with millions of HR processes and tools out there—some good, some bad—it's hard to know which are worthwhile.



That's why we're getting to the bottom of what a lean, resultsfocused HR team needs to thrive. In this guide, you'll find out how you can automate your HR processes to:

- · Simplify the recruitment process
- Deliver an onboarding experience that will keep employees around
- · Glean actionable insights from your team's data
- · Improve employee experience

Let's go!

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Simplify the recruitment process

Finding the best candidate for an open position often means wading through hundreds of resumés, conducting long interviews, and reading through mountains of paperwork.

It's a time-suck for HR teams who already have enough on their plates. Plus there's no guarantee that you'll even find the best candidate.

And that's left many a recruiter asking: how do you source top-notch talent and simplify the recruitment process so applicants have a high-quality experience that puts the company in a good light?

It's a tall order, but automating different stages of the recruitment process can save you time, reduce costs, help find the best candidate for the job, and offer a smooth candidate experience.

As Enrique explains, "Recruitment has quintessential processes that organisations are trying to automate. It's low hanging fruit. Automation can help recruiters with meaningless yet significant tasks. Things like programming interviews and helping people navigate the process of hiring."

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Shortlist candidates faster

Wading through a mile-high stack of resumés is a tiring thought for most recruiters. Not only are there mountains of boring administrative tasks—shortlisting, organizing interviews, sending rejection emails, and so on—but vetting candidates chews up so much of your team's time.

HR automation speeds up the entire recruitment process. As Terrence Yong, Chief Business Officer at Pulsifi, a recruitment platform, says, "Think about the operational efficiencies of just having a machine do your applicant screening. If you've got a particular formula or template in place, it doesn't matter whether you're hiring 100 people, 1000 people, or 10,000 people. What you're doing is codifying hiring so it's consistent, fast, and accurate."

And there are so many automation tools available. Applicant tracking systems like <u>Greenhouse</u> automatically post jobs to job boards, compare job application data, and create a shortlist of suitable candidates based on your hiring criteria.

Other more sophisticated tools can streamline and automate the recruitment process further with automated emails, auto-reject questions, and self-service interview scheduling.



Fast track interviews with video screening

Recruitment doesn't end at finding good candidates though. One of the most time-consuming aspects of hiring is interviewing aligning schedules, finding meeting rooms, and ensuring everyone turns up all takes time.

Automating parts of the interview process using video screening is a huge time-saver. Tools like <u>Vidcruiter</u> invite candidates to record short answers to questions specified by an HR team, rather than live over video or in-person.

By removing the live face-to-face (or screen-to-screen) element from the hiring processes, HR teams eliminate an entire round of scheduling interviews. What's more, because they're not live events, employees can review suitable candidates at a time that fits around their other work.

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Beyond automation: AI-powered recruitment

Cutting edge organizations have started using machine learning models to optimize every word of a job posting. Job advertising platforms like <u>Zoek</u> use artificial intelligence to match relevant jobs adverts to candidates that have the right skills, work experience, and gualifications.

And Al-powered recruitment platform <u>Pulsifi</u> is predicting with high accuracy whether candidates are the right fit for the job and if an employee would thrive in a given environment.



Simplify background checks

The background-check process is also traditionally a labor-intensive and time-consuming recruitment burden.

Linking your HR and recruitment software with background-check providers such as <u>Checkr</u> and <u>GoodHire</u> can automate the admin-intensive background checks, reference checks, and criminal record checks, and speed up your time-to-hire.

Automating this process reduces the risk of error and ensures the right checks are carried out for the right role. As a bonus, it can also help your organization deliver a better candidate and employee experience—which is essential for hiring success and long-term employee retention.



Speed up recruitment with eSignatures

Getting a candidate from 'interested' to 'hired' is often a matter of speed. And while a faster hiring experience will no doubt increase your chances of locking down top-tier talent, one hint of an outdated or difficult process could send an eager candidate running.

It's why a slick hiring process is so important.

Once you've sent an offer letter, you want it signed and returned as soon as possible so you can get on with onboarding. That's where eSignature tools offer HR teams a huge advantage over the competition.

By digitizing the signing process, sophisticated eSignature tools like Dropbox Sign remove steps in the hiring process and speed up the entire process.

But more than simply speeding up the signing process, eSignatures also offer candidates greater flexibility by making it possible to sign anywhere on any device, which means they can sign as soon as the contract arrives.

Even better, advanced eSignature tools deliver an improved candidate experience that is entirely white-labeled to match your brand—removing any confusion that could derail a candidate.

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JobAdder

JobAdder onboards 97% faster with Dropbox Sign

Having been in operation for over a decade, JobAdder is known as the solution for recruiters who wish to simplify their workflows. And a huge part of that solution is a smart alternative for handling (or double-handling) paperwork.

By implementing Dropbox Sign, JobAdder significantly reduced paperwork for its users leading to a faster time to hire. As Tom Dyson, Product Manager at JobAdder says, "Time-to-hire is incredibly important, particularly for recruiters in the high-volume or temp-worker space where they need to get candidates onboarded quickly. Now, with the HelloSign [now Dropbox Sign] integration, recruiters can get candidates onboarded in 30 minutes, which is 97% faster than the previous manual workflow."



Keep new employees around with slick experiences

Just as important as locking down the best candidate for the position, is making sure they stick around. And this starts with the first impression of your business—your onboarding process.

The thing is, onboarding is far from simple—it demands dedicated communication and information exchange between multiple departments. Manual onboarding processes quickly become tedious, error-prone, and a huge source of frustration for your team and new employees.

"Humans are not great at consistency or following a particular process. There's human error, especially when dealing with large volumes of information. The place HR teams are seeing efficiency gains is by having automation do a lot of the heavy lifting. And then using humans for complex tasks, because the machines can't do that," says Terrance.

Forward-thinking HR teams are making huge strides by deploying automation tools that improve their onboarding efficiency of their onboarding process and the experience for new-hires.



Create better first days for new-hires

While everything might be new to first-day employees, the onboarding process is repetitive for HR practitioners. And that makes it ripe for automation.

Using onboarding software, HR teams can automate repetitive manual onboarding tasks by:

- · Automatically sending out welcome emails.
- Notifying managers and co-workers of which tasks need to be completed and when.
- Setting up new hires with the technology they need using IT checklists.

This ensures new employees start their employment fully engaged, productive, and with the right tools, resources, and information from day one. It also takes the legwork out of onboarding for HR teams.

eSignatures cut team admin

eSignature tools are worth revisiting for onboarding new employees, too, because they eliminate so much onboarding admin.

And when, on average, HR departments spend <u>40%</u> of their time on burdensome administrative tasks such as retrieving data from one system and entering the information into another, there are some big gains to be had.

But by implementing an eSignature solution, HR teams can eliminate a huge amount of paper-based admin from the onboarding process. Because rather than posting out paper forms or emailing PDFs, HR teams can use eSignature tools to templatize forms. So once a form —like a W9 or employment contract—is set up once, it can be used again and again without re-entering details.

As an added bonus, eSignatures slash storage and printing costs associated with paper-based processing.



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How Fountain hires at Speed and Scale with eSignatures

The hourly workforce—the biggest source of jobs in the United States and globally—is highly mobile and eager to start working as rapidly as possible.

Fountain's customers, the businesses recruiting this mobile workforce, have to move quickly to hire. Critical to the hiring process is getting an applicant to the final contract signing stage fast. After turning to Dropbox Sign eSignatures, Fountain is now processing **700,000** applications and hiring **96,000** applicants every month.



Make the most of your HR data

Digital software has made analyzing data sets accessible to everyone.

However, not everyone is making the most of the data at their disposal, as up to 73% of company data goes unused for analytics.

And HR teams are one of those business units sitting on a goldmine of data. But often they lack the technical knowledge to make the most of it.

As Terrence points out, "There are silos of information across HR and it's difficult for a human to pull all that together. Today, companies still consolidate and aggregate everything into massive Excel spreadsheets and then try and figure it out from there. Obviously that's not the most secure way to deal with very sensitive pieces of information. But it's also an inefficient way of collecting information."

Today there are easy analytics tools out there that can help organizations track their workforce and measure how effective their HR initiatives are.



Automation for simple insights and metrics

Accuracy and improved efficiency of HR departments are the two key benefits of HR analytics tool. But before you can glean deep insights from data, first you need to collect, store, and sort it in a usable format.

By integrating analytics tools like <u>intellihr</u> into their core systems, HR teams don't have to aggregate data in Excel spreadsheets to unlock insights anymore. Instead, analytics tools can automatically collect and process data to deliver insights such as turnover, cost-per-hire, benefits participation rate, and more. And with this information in hand, HR professionals can understand what's working for and against their organizational growth.

Looking beyond standard reporting metrics

Performance management is a dynamic HR process that tracks, measures, and analyzes employee performance by aligning it with business goals.

Automated performance management software streamlines the process, keeps it bias-free, ensures accurate decision-making, and makes it memorable for both employers and employees. And with this information in hand, you can even predict how likely highperformers are to stay or leave your company.

Additionally, progressive HR leaders have begun to track and report on metrics beyond traditional insights. <u>Visier</u>, an HR analytics company, offers tools that measure the progress of diversity and inclusion initiatives and worker overtime trends.





Improve your employee experience

An HR team's job doesn't end with new hires. Keeping employees productive and happy is a never-ending task that's always evolving alongside technology, culture, and global pandemics.

And in today's world, there's an expectation that your employees' experience is smooth. "People expect consumergrade experiences. And that includes employees. Because of their exposure to other consumer-grade apps, they want something that's easy to use. They want integration of information seamlessly so they don't have to go into different applications," Terrence explains.

But keeping on top of these tasks doesn't have to be an overwhelming chore with a range of tools available to automate functions and stay on top of employees expectations.



Make employee leave requests easy

Managing leave requests manually is inefficient, to say the least. Data input, checking leave balances, getting a manager's approval, and recording the leave for payroll calculations results in an endless chain of back-andforth emails.

Instead, there are simple automation tools out there that streamline the entire process for HR teams. With solutions like <u>Kissflow</u>'s time and leave management tool, employees track and manage their own timesheets automatically, and leave approvals become automated emails.



Take the admin out of expense claims

Before HR automation, HR administrators had to scan through various Excel spreadsheets and stacks of paper files to reconcile employee expense records. Then the HR teams would have to process every expense item into the finance system. It would also need to be reviewed and approved by their manager. Next, onto the accounting department. This is the process regardless of claim size.

Even with a detail-oriented manual process, expenses had the potential to go missing and be filled with inaccuracies. With such a manual process, it's no surprise the backlog would bottleneck, causing frustration and fatigue.

However, expense automation software is eliminating the most painful aspects of filing and processing expense reports. Simple expense claim automation software can simplify the entire process by:

- · Speeding up employee reimbursement
- Limiting errors
- Removing admin for your HR and finance teams
- Reducing your expose to fraud

Newer tools like <u>Spendesk</u> have even created apps to make the entire process fast and simple for HR teams and employees

Conclusion

Tools amplify great processes

All of these tools can help your HR team work faster, smarter, and at greater scale. But technology is only ever as good as the people and processes it's built around.

And more often than not, it's processes that haven't progressed with technology that are adding more labor and frustration to the HR process.

Identifying these gaps and closing them—whether that's through digitization or automation—is a sure-fire way to get more out of any HR team. And one great place to start is with eSignatures, which speed up the signing process and eliminate needless admin for your team.



About Dropbox Sign

Dropbox Sign simplifies work for millions of individuals. Companies all over the world rely on us to help streamline their HR processes, making it easier to close top candidates, onboard new hires, and complete documents without errors. For more information visit the <u>Dropbox Sign</u> website.