

Elevating automation in the HR function

Embracing enterprise content management and business process automation to improve efficiency, streamline compliance and drive higher employee engagement.



1. Introduction

From marketing to finance to customer service, most South African companies are elevating the automation of their core business processes. But human resources (HR) departments in many organisations continue to use paper-driven processes for functions from on-boarding new employees to performance reviews to compiling employment equity reports. Every day, HR professionals waste hours of their precious time finding, scanning and filing employee documents by hand.

Time spent on manual processing of employee records and other paperwork is tedious for HR professionals and could be better focused on strategic goals such as recruitment and employee engagement. Such manual HR processes are not only inefficient, but also increase the risk of data errors creeping into documents needed to comply with South Africa's tax and labour laws.

With shrinking budgets, growing employee expectations and tougher labour and tax legal requirements, HR departments are under pressure to streamline business processes. Technologies such as enterprise content management (ECM) and business process automation (BPA) enable progressive HR departments to improve the level of service they offer employees and the business, while ensuring legal and regulatory compliance.

2. What is HR automation?

HR automation tools enable HR departments to build a high-functioning infrastructure that delivers a superior level of service to employees, job applicants and the business. They help HR professionals to reduce the time it takes to complete tasks — without sacrificing quality of work.

ECM tools enable organisations to capture, store, secure and access information by:

- Making it simple to capture or export documents into a standard electronic format (such as TIFF or PDF), whether they originate on paper or in a digital format.
- Storing documents in a centralised electronic repository.
- Organising documents in a logical manner, so that authorised employees can easily search for, and retrieve documents from any mobile device or computer.
- Archiving old documents as non-editable files so that the business no longer needs to store years of paper records at a great expense.

BPA is an essential part of a good ECM solution, automating time-consuming administrative tasks such as filing documents, creating new folders and transferring documents between employees. BPA software also eliminates the need for paper-specific tasks like making photocopies and gathering handwritten signatures.

3. Use cases for HR automation

Most HR and payroll processes are heavily document-driven — ECM and BPA can bring efficiencies to nearly any process that involves the capture, processing, management, sharing and storage of reams of documents. Some examples of pain-point processes where automation can deliver rapid benefits include:

Timesheets:

HR departments can automate the process of reminding employees to review their timesheets; managers can sign the timesheets off in a smooth process.

Recruitment:

Applications submitted through online forms can be automatically stored in an ECM repository and assigned to a recruiter for review.

Onboarding:

Confidentiality agreements, employment contracts, personal information forms, waivers and other forms can be sent to new hires and, once completed, securely stored.

Performance management:

Managers can rate employee performance in an electronic form that is automatically routed to supervisors for review.

Expense claims and travel requests:

Create and host web forms on intranet sites for employees to submit travel requests, expense reports and more.

Compliance documents:

Track policy acknowledgements, health & safety waivers, and other employee agreements.

4. Benefits of HR automation

The benefits of HR automation technologies are numerous and multifaceted:

- **Productivity increases:**

ECM and BPA enable HR departments to increase their productivity by speeding up the time taken to retrieve, manage, file and share documents and information.

- **Cost-savings:**

Automation technologies enable HR departments to take the costs of managing and storing paper out of their business, including printing costs, paper costs, courier costs and storage costs.

- **Enhanced collaboration and less friction in business processes:**

People throughout the business have access to a central database, even if they work at geographically dispersed sites. That means they can work together in real-time, without waiting for documents to be emailed or couriered.

- **Reduced risk of non-compliance:**

With automation technologies and documents stored in a secure electronic repository, there is less risk of confidential documents being tampered with or misplaced. Secure logins mean only authorised users can access documents.

- **Improved accuracy:**

Automation means fewer data entry errors and lost files.

- **Improved employee satisfaction:**

The HR team will enjoy higher job satisfaction, because they will be able to spend more time on strategic work and less on managing red tape. They will also be able to provide a better level of service to the workforce, contributing towards employee satisfaction throughout the business.

- **Provide employee self-service tools:**

With a robust HR ECM and BPA platform in place, HR departments can enable employees to sign paperwork and access info such as their recent payslips at their leisure. This alleviates the heavy workload of the HR department, while providing a convenient service to the workforce.

- **Refocus HR time and skills on activities that add value to the business:**

HR departments that automate paper processes can turn their attention to what matters most: finding great talent and helping it to perform to its true potential. The HR team will have more time to analyse HR data to make intelligent business decisions.

5. Five steps to HR automation success

HR automation will only be successful if it is backed by a solid plan of execution. Here are five steps that an organisation can follow to ensure successful stakeholder, departmental managers and end-user adoption of ECM and BPA tools and solutions:

1. Choose someone to own and champion the project

The first step towards a successful HR automation project is identifying the right people to own, champion and manage the initiative. The project owner will take accountability for the day-to-day management of the rollout. The project champion will rally support for the project by sharing a vision for the future with the employees who will use the technology, as well as with the organisation's leaders.

The project leader and project champion must be able to:

- Effectively communicate with all departments, including IT.
- Understand the requirements of the end-users who will be using the new system daily.
- Articulate the value of automation to different departments, employees and stakeholders.
- Identify potential early adopters of automation and enlist their help in promoting the solution.
- Break through end-user's resistance to change by showing people how the system will benefit them on a daily basis.

2. Get business-wide buy-in

The project champion should seek support for the project right across the business, not just from the HR department. The reason for this is that many HR processes such as leave approvals or travel requests span the boundaries of multiple departments. Without wide support and adoption by managers, employees and line departments, HR automation will not succeed. The HR automation project owner should find people in other parts of the business that are frustrated by manual HR processes, such as filing expense claims or travel requests. They will be strong allies as the HR department begins to advocate for automation of business processes.

3. Understand current processes and pain points

The next step for the project owner is to gather information about the HR process from end-users, stakeholders and any other involved parties. He or she should find out about the inconveniences and inefficiencies people encounter in their day-to-day work, so that the project can focus on sustainable wins that make a real difference.

Some information the project owner should gather includes:

- How employees are trained on HR processes.
- How employees perform their HR-related tasks.
- Bottlenecks and redundancies in HR processes.

4. Process mapping

The business process analyst should work with the project manager and the IT department to map out the HR department's business processes, as well as speak to business users to understand their requirements and what they would like to see from an automated process. Some questions to ask include:

- Are there any obvious manual processes that could be automated for quick wins?
- Is the task assigned to the most capable people at each point in the process?
- Are there opportunities to improve efficiency by centralising processes and decisions?
- Who should own and execute a process or task - an employee, an employee's manager or HR?

5. Training and change management

Making the switch from a manual to an automated HR process requires a significant change in employee behaviour, brought about through appropriate investments in training, adoption marketing and change management initiatives. Some of the engaging tools companies can use to smooth the transition include:

- Classroom training, tailored to the needs of different class of users.
- Online instructional videos.
- Interactive online learning.
- User group meetings.

6 Conclusion

Put people first when automating HR processes

Facing an ever-changing and increasingly complex technology and talent landscape, South African HR departments need to seek out tactics, processes and tools that will enable them to enhance their performance. For many, the answer lies in automating manual business processes that slow down the business, impair efficiency and complicate regulatory compliance.

By introducing tools such as ECM and BPA, HR departments are able to realise benefits such as better productivity, cost containment, compliance, efficient access to employee information and candidate talent information, as well as improved strategic focus.

HR is about the people in the business, and automation technology should be leveraged to better serve every colleague and manager in the business – not to replace them. Not every aspect of HR can or should be automated. Instead, automation is about enabling HR to better deliver against its mandates of acquiring and retaining the best talent, and to help colleagues to perform to their true potential.

KYOCERA Document Solutions South Africa

90 Bekker Road | Hertford Office Park | Vorna Valley | Midrand
Tel +27 (011) 595 2600
www.kyoceradocumentsolutions.co.za
info@dza.kyocera.com



kyoceradocumentsolutions.co.za