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Must-have features:

HRIS REQUIREMENTS CHECKLIST





The recruitment environment continues to evolve at a rapid pace. HR leaders are having to find ways to remain agile and flexible, while professionals are increasingly able to choose where they work based on the company culture, benefits, and quality of life on offer.

With **87 percent of companies** currently experiencing a skills gap—or likely to face one within the next few years—attracting, engaging, and retaining the best people for your business remains crucial. **Twenty-nine percent** of the skills listed in 2018's average job posting will be obsolete by the end of 2022, and for many HR leaders, a modern Human Resource Information System (HRIS) is the key to keeping pace with these rapid changes in the market.

Choosing the right system for your business can be a make-or-break decision, but with so many HRIS features to get your head around, how can you be sure you've made the right choice?

This HRIS requirements checklist will take you through all the must-have features of HRIS, why they're important, and what to look for when doing your research.

Why do you need an HRIS?

An HRIS is the ultimate tool for a modern HR function. As businesses grow and working patterns evolve, it's more important than ever for HR leaders to build a strong culture founded on meaningful connections and effective collaboration.

There are many different **types of HRIS systems**, but the best can adapt and scale with your changing needs, helping you tackle each of the challenges that lie ahead and keep team members motivated, connected, and inspired.

Although businesses are increasingly taking advantage of these platforms, **24 percent of HR leaders still ranked effective technology use as their most significant hurdle**.

With **engagement levels at work** taking a downward turn in recent years, there's a pressing need for HR managers and leaders to build deeper relationships and connections. Team members' engagement dropped from 36 percent in 2020 to 34 percent in 2021 and 32 percent in early 2022, and 17 percent of professionals are actively disengaged—an increase of one percent since 2021.

No matter what uncertainty lies ahead, an HRIS is ready to take the strain and help your people feel good about their contribution at work.

Choosing the right HRIS for your needs

When looking at different technologies, there are many HRIS features to examine to make sure that you find the right platform for you. This HRIS requirements template is designed to help you understand HRIS system requirements and the relevant questions for each. You can use these to align your strategy with the ideal platform so that you can secure the best HRIS for your needs today, tomorrow, and for the future of your work and business.



HRIS features to consider:

Automation

Why is it important?

Automation is the future for a wide array of business processes, and HR processes are no different. With many common tasks from data entry to record-keeping easily carried out by technology, it's one of the quickest and easiest ways of freeing up your time to focus on building strategies that improve performance, efficiency, and retention among your teams.

What should I look for?

Effective HRIS automation should make day-to-day life easier for everyone in your company, taking care of repetitive tasks more consistently. Look for a platform with agile automation across the likes of performance management, onboarding, offboarding, payroll integrations, time and attendance, approval processes, and development plans. Don't forget to check the list of integrations and make sure the HRIS can integrate with the current HR tech stack plus other company platforms dealing with the employee lifecycle for a seamless experience.

What's my to-do list?

- Make a list of repetitive tasks
- Make a list of your current tech stack that needs to integrate with the HRIS
- Make a list of tasks that employees need to take care of as new hires, annually, or at certain intervals that may be automated
- Document the process for each task that can be put into an automation workflow
- Make notes of extra items that you want to be included in automated workflows such as reminders, lifecycle triggers, visibility to stakeholders, etc.

Onboarding/offboarding

Why is it important?

Taking the time to carefully and thoughtfully bring people into and out of your teams goes a long way towards improving job satisfaction and creating a positive environment—and can even support your **boomerang employee** strategy. But many of the tasks involved with onboarding and offboarding can be achieved much more quickly and easily with an HRIS, especially with so many employees working in hybrid and remote environments.

What should I look for?

Take the time to examine your prospective HRIS and make sure it can give you the support you need to ease your onboarding and offboarding processes, for every type of employee, in all offices and regions.

Getting new starters up to speed with your systems can be managed directly by an HRIS, with new team members following an automated, predefined workflow customized for different roles, regions, and regulations. The same HRIS should have a pre-boarding program to onboard quicker with visibility to the org chart, company policies, and digital forms that they can sign, complete, and return within one platform. Finding an HRIS that lets you integrate your recruitment processes and legal compliance needs will truly maximize your efficiency.



For offboarding, look for an HRIS that lets you collect data-driven insights from exit interviews that inform your planning, and which features an easy-to-follow offboarding program that makes for a straightforward process. A platform that helps you update co-workers about staffing changes, ensures you retrieve company property, and reminds you to mark team departures will make your life significantly easier.

What's my to-do list?

- Identify all the steps and items needed for a typical new starter's workflow
- Gather together onboarding documents and materials
- Identify technologies that need to be integrated and automated with the onboarding workflow
- Make a list of key offboarding steps and insights that need to be completed
- Find an HRIS that lets you integrate all of these processes

Performance

Why is it important?

Performance management is a functional method of assessing your team members' effectiveness and finding ways to develop their skills in service of company objectives. Done correctly, it can lead to much higher satisfaction levels, helping you build a happier team who are able to grow and develop. Assessing performance across large teams with the power of an HRIS can help you identify trends or wider skills gaps, and progress your productivity, retention, and engagement company-wide.

What should I look for?

Following **performance management best practices** will lead you to an HRIS platform that allows you to track performance, and then effectively plan and action a strategy for maintaining and improving it. The best systems allow you to draw conclusions at individual, team, department, and organizational levels, driving your planning of both the micro and macro.

To do it right, you'll want a system that incorporates peer reviews, regular feedback cycles (traditional yearly reviews are too imprecise), and the ability to set goals and celebrate achievements for team members. It will also help you regularly schedule one-on-one meetings with managers, create structured cycles of reminders, messages, and approvals—and access all of this data easily, to inform relevant decision-making. maximize your efficiency.

What's my to-do list?

- Create a strategy for a performance review cycle with employee and peer involvement
- Create a workflow of the performance management cycle
- Include peer reviews, management reviews, and approvals
- Review company platforms and technologies that need to be integrated into the workflow
- Set guidelines for storage and retrieval of reviews so it is available for promotions and career growth
- Look for an HRIS that helps you manage the process from start to finish, and also draw insights from the data



Compensation and benefits

Why is it important?

Administering benefits and additional lines of compensation or bonus payments can be effectively managed within your HRIS, and then automatically updated in other platforms via integrations—saving you administration time and reducing data entry errors. It can take care of changes to people's job status and benefits across the full benefits lifecycle, making sure nothing slips through the net.

What should I look for?

Depending on the nature of your business setup, your new HRIS should be able to take care of all relevant **compensation and benefits administration**. The very best will also include team member-facing interfaces that allow professionals to access, manage, and learn about everything on offer for themselves and their families. Ideally, it should contain all the most up-to-date information in one centralized place, and be able to handle digital signatures from all stakeholders. It should also automatically update all your integrated platforms, and feature approval cycles and sufficient localization across your different offices and regions, in line with regulations.

What's my to-do list?

- Consider the complexity of your compensation structure, as well as how many benefits you offer your people
- Make a list of your current tech stack, and the integrations you require
- Look for easy centralization, automation, localization, and the ability to handle digital signatures

Time off

Why is it important?

Time away from work is an essential element of creating a positive company culture and protecting your people from fatigue, overwork, and burnout. Making it quick and easy to see how much leave each team member has left, and implementing an efficient booking and approval system, will go a long way towards giving your people sufficient rest and improving your retention.

What should I look for?

An HRIS that enables the straightforward administration of annual leave will make everyone happier, so make sure yours directly integrates with payroll to account for any salary knock-ons. You should target a platform that includes quick and easy approval processes, with alerts pushed to mobile phone apps or in-company workflows. Policies that can be customized for each role, region, and office are also important, as is a centralized calendar with everyone's time off—so you can make sure every team has cover.

For total visibility, it's also worth considering an HRIS with a global vacation visibility function, so that team members understand why they may not be receiving the speedy response they'd expect.



What's my to-do list?

- Make a list of your payroll tech stack to ensure correct integration
- Look for quick and easy approval processes that connect to all your regular workflows and apps
- Identify the customizations you require across role types and offices or regions
- Find an HRIS with a centralized calendar to make sure teams are covered, and to help your people identify when team members are on vacation

Time and attendance

Why is it important?

Time and attendance management is one of the typical features HRIS systems have—one that allows you to easily keep track of team members' work hours. It means saying goodbye to the days of manual timestamps and attendance inputs and removes the need to laboriously add this data to your accounting system. Also, upgrading your functionality here makes it easy to see and add missing information, eliminating the hassle for your team members.

What should I look for?

Easy integration with your payroll and administration systems is important, as details can be exported according to payroll cycles. Also, your HRIS needs to have easy approval cycles and processes for professionals and managers, reminders to complete missing hours, automated messages to submit time and attendance according to payroll cycles, and the ability to generate reports that help identify problems or calculate overtime hours.

What's my to-do list?

- Make a note of your payroll cycles, and if these differ by region
- Make a list of your payroll and administration systems that require easy integration
- Check requirements for part-time and contract workers
- Look for a platform with customizable reminders to complete hours and submit attendance, and that can quickly generate useful reports



Payroll

Why is it important?

Your company may well have already migrated your payroll processes to an independent system, but the best HRIS platforms bring all of these under easy control, automating payment, calculations, and reminders, and even enabling self-service for your team members. It's important to integrate all kinds of individual information—relating to pay scale, promotions, benefits, and bonuses—with your payroll system so that your people are paid correctly, and on time.

What should I look for?

An effective HRIS will integrate easily with your payroll system, transferring all the relevant information so that team members are paid the right amount, at the right time, into the right account. This integration also cuts down on manual data entry errors and reduces the amount of repetitive work required to update multiple systems—saving vast amounts of time, particularly for large organizations with many salary tiers and unique payment protocols.

What's my to-do list?

- Identify your finance and payroll administration tech stack to ensure adequate integration
- Make a list of the key employee information that you need your HRIS to exchange with your payroll system
- Review how often updates are made, pay cycles, and how often information can be exchanged between systems

Analytics

Why is it important?

Today's HR leaders understand the importance of data and are using it both to make necessary changes to their strategies, and to confirm that they're moving in the right direction. The deep analytics made possible by an **HRIS platform**—drawing on information across the full spectrum of your engagement systems—can give you incredible insights into possible efficiency improvements you can make, a look at the performance of your teams, and even the changes you could make to improve retention. These findings will also make it easy for you to demonstrate to senior leadership that the strategies you've developed are working, and reveal the data correlations that drive shifts in your planning. At the end of the day, making decisions based on facts and data will ensure you have sufficient grounding for those choices.

What should I look for?

Your new platform should allow you to generate custom reports that match your needs, and also feature at-a-glance KPI dashboards that categorize significant trends in your business. Attrition indicators are another effective tool for identifying at-risk people in your teams, helping you reduce turnover organization-wide. Also, look for features such as print, share, and customize that let you give senior leadership a quick snapshot containing exactly the data that they need—so that you can get impact from your insights.



What's my to-do list?

- Make a list of the data you're currently able to capture, and whether this is providing you with clear impact
- Make a list of who needs to see data and reports, and how often, and the best way to show and share this data
- Look for a platform with attrition indicators, KPI dashboards, and customizable snapshot reports that establish your data as a single source of truth across vectors such as gender balance, retention rate, attrition rate, and your inter-team relationships

Anonymous surveys

Why is it important?

Giving people a voice makes a big difference to your work environment, building trust and basing relationships on open communication, accountability, and feedback. Anonymous surveys are an important HRIS feature that give employees a space to be heard, giving you invaluable insights into trends among your teams, such as animosity that may be slowly appearing.

Measuring your people's satisfaction levels at regular intervals will help you stay on top of emerging issues, and identify ways of constantly improving the work that you do.

What should I look for?

HRIS platforms that come with a library of survey templates will save you time in the long run, and it's important to be able to analyze the results compared with other time periods to see if you are moving in the right direction. Setting up surveys that trigger at key stages of the company is an effective way of keeping your finger on the pulse of how employees are feeling. That way, you can address issues before they become significant.

Also, an effective platform will enable anonymous reporting that keeps you compliant and allows you to manage complaints in accordance with relevant local regulations. And remember, employees today want to feel heard, so if you ask for their feedback, you should have a communications plan ready to let employees know how you will be handling this feedback.

What's my to-do list?

- Make a list of the surveys you currently carry out, and whether these are triggered at regular intervals
 - Look at how you currently manage complaints or identify team issues, and explore how an HRIS can support a clearer process, in line with compliance requirements
 - Create a strategy around how to handle feedback from surveys, and a clear process for improvement
 - Create a plan for talking to employees about the surveys, and the process that management will have to make improvements
- Look for a platform with a template library to save you time building surveys from scratch



Why choose Bob over other HRIS solutions?

For fast-growing, dynamic companies in any industry, Bob is a powerful platform that connects professionals, supports a healthy company culture, and drives collaboration.

Bob is core HR and so much more. With Bob's wide range of core functionality, you have everything you need for productivity, engagement, and retention:

- Grow your offices and people globally with the agility and configurability that adapts quickly to the changes you face daily.
- Streamline processes like payroll and performance reviews, making sure everything is running smoothly while saving time and money.
- Find all documents in one place while managing the entire process including signatures and approvals.
- Prove that what you are doing works, or make strategic changes with insights and reports based on people data.
- Make onboarding a piece of cake with templates and customizable workflows to match roles and regions.
- Tap into all your HR tech with multiple integrations with leading third-party tools to make administrative tasks easier for everyone across the organization.

Bob's culture tools connect employees and managers worldwide, creating a great experience—wherever your people are:

- Designed for everyone in the company—managers, employees, HR teams.
- Enjoy the comradery as everyone in the company uses the social media-like interface to update profiles, join clubs, and give recognition.
- Let everyone be the first to know by delivering communications directly in the company apps like Slack and more.
- Create a welcoming environment with new hires by introducing the company organization chart, values, and more even before the first day of work.
- Never miss a milestone by creating workflows around major moments like anniversaries, lifecycle stages, and more.
- Customize touchpoints around roles, regions, and responsibilities, building personalized experiences around their perspectives.
- Appreciate employees at the moment with kudos and shoutouts that motivate and empower productivity and innovation.

