

How Melio consolidated their HR tech stack and streamlined processes in just 31 days



Melio is a fintech company based in New York City, with additional offices in Denver and Tel Aviv. When Melio was a small company of around 50 employees, they implemented a well-known US-based HRIS to help them manage HR. However, it quickly became clear that it didn't fulfill their needs. They had to add point solutions to fill gaps in the system, including a tool for manually creating an org chart and a platform for running performance reviews. As the company scaled—growing over 200 percent in headcount in one year—their initial search for a new org chart tool quickly became a quest for a new HRIS. They realized they needed a “one-stop-shop” solution to manage everything HR, and after being wowed by a demo and HiBob's professional and helpful team, they chose Bob and went live in just 31 days.

	Founded in	2018	What they do	Financial services (Fintech)
	Headquarters	New York, NY	In a nutshell	Melio provides an easy and flexible way for companies to manage their business-to-business payments and receivables online, including vendors, suppliers, and contractors.
	Employees	615		
	Sites	3		



When I saw Bob, I just loved it. It was the best HR platform that I'd ever seen. As a person who loves tech, people, and data, I was ecstatic to manage the project. We had an intensive implementation process that we needed to reduce from three months to 31 days, but we did it! Being part of Bob's implementation has changed my life. This is the role that I want for myself now. To manage Bob and be the very best!"



Ayelet Marum
HRIS Manager, Melio

Replacing point solutions with a single HR platform

Previously, Melio had to add point solutions to their HRIS that didn't speak with each other and required manual entry, which was prone to error. After realizing this wasn't scalable, Melio decided to look for a single HR platform that was powerful, efficient, and provided a good user experience.

Streamlining HR with Bob's integrations and automated workflows

With Bob, Melio automates HR in a way that wasn't possible before, streamlining their **core HR processes** and saving time. Plus, Bob integrates with their favorite tech tools, creating a more efficient way of working.

For example, before using Bob, when they hired a new employee, they recorded their data on a spreadsheet, including first name, last name, and personal email. They then manually added that data to their HRIS. Now, Melio's ATS, Greenhouse, is integrated with Bob, which saves them time by automatically syncing data between the systems. No need for manual data entry and no risk of error.

As Ayelet Marum, Melio's HR Manager, explains, “We love Bob's integration with Greenhouse. It's a whole new world from what we had before. We used to use around ten different spreadsheets to record data, and we would add all the employee data to a spreadsheet and then manually add it to our previous HRIS. Now, I get a notification from Bob when a new hire is added, and the docs go automatically to the private folders. It's amazing!”

It doesn't stop there. Melio built out a new preboarding and onboarding process using Bob's workflows. For preboarding, they begin two weeks before their start date by sending an email that includes a video of the CEO welcoming them to the company, an invitation to fill out their personal details in Bob (which 90 percent of new hires complete), and instructions for activating their Melio email account in Google Workspace.

Then, one day before they start, Melio's HR sends another email with a video that includes a virtual tour of the office, focusing on all the important places, such as the well-stocked kitchen, and providing instructions on how to order lunch. This helpful video puts new hires at ease and makes them feel welcome and excited for their first day at work.

With their details ready in Bob and their email accounts set up, HR can start setting up the new hires with everything they need, such as providing permissions to relevant tech tools and adding them to payroll.

Once preboarding is complete, Bob's onboarding workflows kick in. They include all of the tasks their new hires need to get started. There are even specific onboarding workflows for different groups in the org, including per site and employment type (full-time versus contractors). This way, Melio can ensure that their people have a positive onboarding experience tailored to their needs and objectives with everything they need to get started at the company.

Finding an HR platform to support Melio's growth

As Melio grew, they saw that their needs as a company changed. Their headcount increased, people started working hybrid, and they became more global, with people working from different sites and across different time zones. These changes impacted how Melio's people worked together and the company culture, as they were no longer a small, intimate company.

Melio needed their HR platform to be scalable and the single source of truth for their teams working across geographies. They also wanted it to help build a positive company culture and a sense of community for their people working near and far.

Improving cross-company communication and engagement

Bob has helped bring Melio's people together in more ways than one. Firstly, having a centralized HR platform for the entire company has helped break down the barriers between departments and provides a more efficient way of working.

For example, Bob has helped to keep Melio's HR and finance departments aligned, with employee data on time and attendance, performance, and compensation easily accessible to the teams, across sites, in one easy-to-use platform.

And as Melio grows and their needs evolve, Bob's flexibility enables them to quickly make changes and add new fields. For example, the Finance, Planning, and Analysis (FP&A) Team wanted to add two additional fields to compensation, addressing the reason for a salary raise and the business case relating to the raise. Making these changes to Bob was simple, taking less than five minutes to implement, and with no need for back-end support.

Bob has also helped Melio boost engagement across the company. They use Bob's homepage as a centralized place for sharing company announcements and post Shoutouts that welcome new employees and celebrate their professional and personal milestones. Recently, Melio's feed has been full of new baby photos (Congrats!) born to their employees, with warm wishes and fun emojis posted in response. Bob has enabled Melio's people to hybrid from within the US and Israel and from Belarus to get to know each other, creating warmth and camaraderie among their people, near and far.

Main takeaways

- A 31-day implementation enabled Melio to run their year-end performance review cycle in Bob.
- Melio replaced their previous setup of an HRIS plus several point solutions with Bob and now has all their employee data in one place.
- Bob's integration with Greenhouse has simplified the hiring to onboarding process and removed the risk of manual error.
- Bob's homepage boosts employee engagement among their people working near and far.

Melio's favorite Bob features

		
Compensation	Core HR	Onboarding
Streamline allocation across your organization	Manage HR, automate processes and build culture	Make a great first impression for your new hires

Melio's workflow integrations

		
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