

Three Tips to Get Started on the HR Automation Journey



Getting Started With HR Automation Doesn't Need to be so Difficult

This is the time of year for the dreaded performance review process.

One of the reasons that it is so dreaded is that conversations about performance (the real goal) tend to be crowded out by a focus on manual workflows, poorly constructed and (mis)managed documents, and a preoccupation with the mechanics of the process rather than its substance.

The Gallup Organization's [State of the American Workplace](#) report defines engaged employees as those who are involved in, enthusiastic about and committed to their work and workplace:

"The American workforce has more than 100 million full-time employees. One-third of those employees are what Gallup calls engaged at work. They love their jobs and make their organization and America better every day. At the other end, 16% of employees are actively disengaged — they are miserable in the workplace and destroy what the most engaged employees build. The remaining 51% of employees are not engaged — they're just there."

Gallup goes on to note "a mere 21% strongly agrees that their performance is managed in a way that motivates them to do outstanding work, and *just 18% strongly agrees that employees who perform better grow faster at their organization.*"

The performance management process is thus a great place to start in getting serious about HR automation. In order to get started, organizations need to focus on three priorities:

1. The **substance** of performance management (what is discussed, with whom, and how consistently);
2. The **process** of performance management (how these conversations are documented, secured, and automated); and
3. The **connections** between performance management and how this "sub-process" is connected to the broader process of HR (human resources) management.

Truth be told, many organizations struggle with HR automation and standardization because historically it's been *too darn complicated*. But HR processes all share some common characteristics that make them ideal candidates for automation — if the solution is easy to deploy and use.

- They are all labor intensive.
- They are all document intensive.
- They all tend to be ad hoc and cry out for standardization.
- They are all prone to compliance and legal challenges.
- They all require a need for information and process security.

At AIIM, we believe that there is a core set of capabilities that are necessary for organizations to digitally transform. We call this **Intelligent Information Management (IIM)**.

But where to start? Here are some suggestions:

1

The substance of performance management (what is discussed, with whom, and how consistently).

Set clear and measurable organizational goals. In order to align employee goals with organizational goals, the latter needs to exist and be well understood.

Correct bad culture. The core focus of process management excellence is constructive, regular and honest conversation with employees. If these conversations do not already occur in some form, stop. Understand the weak and counter-productive elements of your culture before moving on to performance management automation.

2

The process of performance management (how these conversations are documented, secured, and automated).

Start simply. Provide a central, secure home for each employee's documents. Then introduce key workflows when you're ready to standardize processes and approval chains.

Conduct an inventory of the core documents and workflows that are part of your current process. Performance management at most organizations is a hodge-podge of non-standard forms, documents, and manual processes. Identify what you are currently doing, standardize as much as possible, and simplify.

Create predictable and automated workflows for key performance management processes and documents. One of the things that sucks the life out of many performance management processes is the sheer drudgery of all of the manual processes and paper documents and non-standard documents that detract from "real" work. You can fix this by implementing HR automation software.

3

The connections between performance management and how this "sub-process" is connected to the broader process of HR management.

Identify the connections between the performance management processes and other key processes. One of the mistakes many organizations make is to implement point solutions to solve particular business problems. While this may eliminate short-term process pain, understand whether and how the information and documents in the performance management process need to be incorporated into other key processes, and make sure your short-term proposed fix is not creating a future information silo.

View HR as a system of processes, not a single process. Attack each sub-process one at a time, but do so from a common document and process framework; *these processes need to connect with each other.* In addition to performance reviews, key HR sub-processes include:

- Recruiting
- Talent pool
- Onboarding
- Time-off management
- Legal compliance
- Certifications
- Employee separation

View performance management as an ongoing process, not something that occurs once per year. Frequent and well-documented conversations conducted in a consistent way are key to building an effective strategy for employee engagement.

This Tip Sheet is underwritten by DocuWare.

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