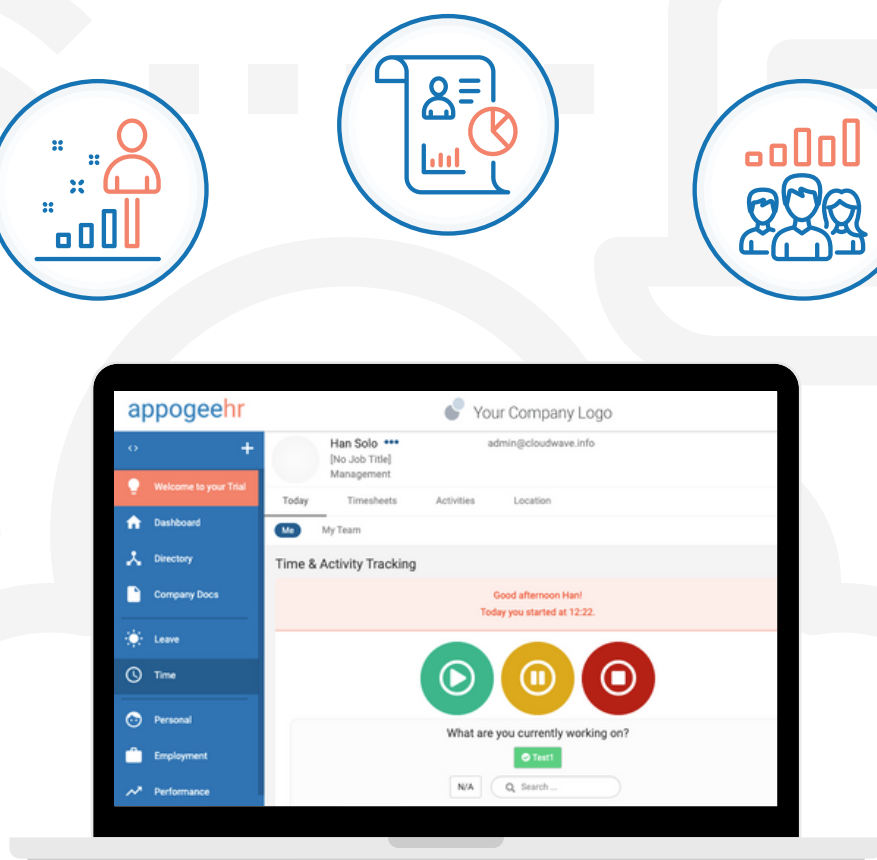appogee**hr**

The Small Business Guide to HR Tech

Manage Your HR From Anywhere

Introduction

HR technology can actively help your business through innovating your people management and enable your HR teams to focus on what's important, your staff.

The Small Business Guide to HR Tech has been created to help you navigate the sometimes confusing world of HR technology by identifying the must-have criteria for your innovative investment including important areas to consider when choosing your application. So let's dive right in!

What is HR Tech?

Ultimately, HR Tech is defined as a technological solution, such as software or applications, which can be used by business owners and people management professionals to manage and optimise HR requirements. The right HR software solution should be able to help your business:

- Track and report on any types of absence
- Reduce your HR admin
- Securely store employee information
- Share important company documents
- Effectively report on your employees
- Integrate with your current working tools
- Advance your digital HR as your business grows
- Allow HR to run from anywhere

We're aware that, with many options out there today, it can be confusing to decide which HR solution is right for you. Our aim with this guide will help you decide what HR tech your business needs right now, what you might need in the future, and help you get on the right path when it comes to your digital transformation.

TRACK AND REPORT ON ANY TYPE OF ABSENCE

REDUCE ABSENTEEISM, REPORT ON WELLBEING OR JUST EASILY MANAGE CARRY OVER & ALLOWANCES.

Using an online leave management solution is often the first step in realising the benefits of HR tech solutions. This is because they tend to be easy to set up, easy to use, and therefore often instantly adopted by your workforce making the transition, from paper & spreadsheets to the online solution, welcomed. Helpfully for your business, this allows you to see an almost instant boost in productivity and is a great introduction to driving HR tech innovation in your company.

A leave management solution will allow you to set up a simple approval workflow between your employees and managers. This means that employees can request holidays, work from home, sickness, or any other kind of absences, through a discreet online portal. The managers within the workflow will then need to approve this before the employee is permitted the time off.

Allowing employees to request holidays through an online system allows your managers to take control of their teams to ensure the business is covered during peak holiday seasons. For any planned absences, this can help ensure there's never a time when your phones and emails aren't being covered within teams or the company as a whole.

DID YOU KNOW?

IN THE UK, EMPLOYEES TAKE AN **AVERAGE OF 6.9 DAYS OF SICK LEAVE** PER YEAR*

*ONS, 2020

TRACK AND REPORT ON ANY TYPE OF ABSENCE

Sickness requests being made through a portal also have additional benefits. The discreet tool allows the manager to see why an employee might be off, without the need for any potentially awkward conversations with any other member of staff. This can also allow for managers to track and report on any employees who are frequently absent and address any potential issues that may be arising with absenteeism or patterns around mental health issues. By allowing for this information to be reported on you can then take steps to ensure you can do everything in your power to promote employee wellbeing before it becomes a bigger issue.

88% OF EMPLOYERS BELIEVE THEIR STAFF HAVE TAKEN SICKNESS ABSENCE DUE TO MENTAL ILL-HEALTH*

MAKE SURE YOU CONSIDER...

The different types of annual allowances you might need

Your HR solution should be able to handle any kind of complex calculation when it comes to each individual's annual leave requirement. You might have part-time staff, TOIL (time off in lieu or comp time), unlimited Paid Time Off (PTO), fixed allowances, or accrual. If your HR solution provider is experienced in all different areas of time off requirements, the ability to set these up within your solution should be simple.

*Personnel Today, 2019

REDUCE YOUR HR ADMIN

ALLOW YOUR STAFF TO FOCUS ON WHAT'S IMPORTANT BY REDUCING HR ADMIN

By using an HR software solution and negating the need for paper information, you can finally get rid of your filing cabinets and use that office space more wisely. Equally, the out of date information becomes a thing of the past. This is because of something called Employee Self-Service or ESS which allows each employee easy access to update their own details online. This information could meet basic requirements, such as addresses and bank details, allowing your HR and Payroll teams peace of mind knowing that the information they're using is the most up to date. With access controls in place, you can also ensure this information is only accessible by those who need it, allowing your admin teams to also store passport copies or other right to work information, within each profile, whilst ensuring that nobody else in the business can get access to this.

AN ESTIMATED 40 MILLION HOURS IS WASTED ON SIMPLE HR TASKS*

*Topia, July 2020

REDUCE YOUR HR ADMIN

Messy filing cabinets are often filled with out of date information on individual employees, this could be address details, holiday forms, copies of right to work information, or even bank details! This means they're taking up space, potentially accessible by anyone and the idea of organising them is far too time-consuming to consider. Additionally, if you're using shared drives to store this information could be getting messy and also potentially accessible by individuals you don't want accessing that data, even some of your own IT staff! Implementing an HR management system means you can easily access the information you need, all stored in one secure system in the cloud.
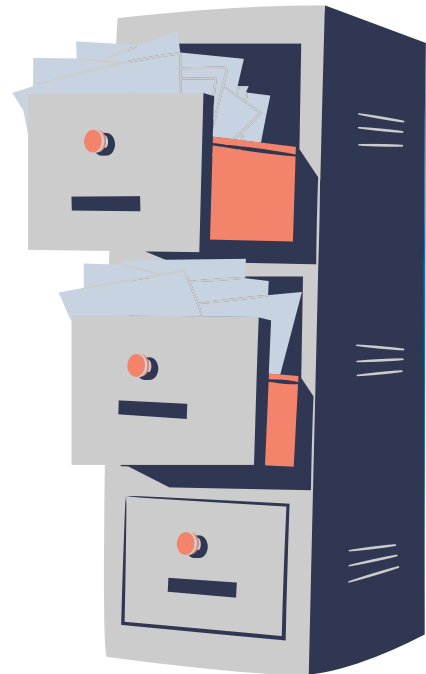
MAKE SURE YOU CONSIDER...

How long the solution will take to set up & be adopted by staff

You'll need to start using your new solution as soon as possible to get the most out of your investment, so make sure you have a user-friendly HR software solution that your staff can set up and start using immediately. Should you need any kind of assistance from your technology provider, make sure there is an option for you to invest in additional set-up assistance if needed.

SECURELY STORE EMPLOYEE INFORMATION

ENSURE YOUR STAFF DATA IS ONLY ACCESSIBLE BY THE RIGHT PEOPLE

Businesses are all fully aware of the importance of data security, privacy, and regulatory compliance. With the introduction of GDPR, this became even more of a spotlight focus in the last few years. Ensuring your customer data is secure is a top-of-mind priority, but equally important is the peace of mind you and your employees feel from knowing their own data is 100% secure.

Storing sensitive employee information in a secure environment is of paramount importance. As mentioned previously, leaving information, such as salary data and personal details, in a shared drive or filing cabinet means that someone else in your business could have access to that information. For example, your IT team will most likely have admin access to all of your shared drives, should you need them to sort out any technical issues, which will also mean that they will be able to access, delete, move and create files and folders. Often, trying to configure access controls within shared drives can also be complex which makes multi-level access within an HR solution so important. Essentially, keeping this sensitive data in a separate and secure platform avoids internal exposure to your IT teams.

Similarly, you may need your finance team to have access to bank details, whilst ensuring that any other members of the organization are unable to see that level of detail. Equally, you may wish for your managers to have access to information on individual team members, which other team members are unable to see. With the right HR solution, this should all be configurable.

SECURELY STORE EMPLOYEE INFORMATION

Using an online HR software solution also means that you need to ensure the platform the solution sits on is also securely stored in the cloud with a highly scalable data center environment. This provides you as a business owner with peace of mind, meaning you'll never have an issue with being able to access and report on the data you need. Finally, being able to use secure login environments, such as single sign-on or two-factor authentication, should also be able to provide you with yet another layer of data security. This could be done through integrations, which we'll cover off later, or through your chosen HR app itself.

MAKE SURE YOU CONSIDER...

GDPR regulations
You should seek independent legal advice when it comes to GDPR as it is something all businesses need to ensure they are clear on. Your HR solutions provider should support the core pillars of GDPR to assist you with meeting your obligations as a data controller under GDPR, and they should also demonstrate they can deliver on their obligations as a data processor.

Independent data security verification
Make sure you check in with your HR solutions provider to ensure they're independently verified for data security protection. The Cyber Essentials Plus accreditation, for example, has been devised by the National Cyber Security Centre of the UK Government. Accreditation means that verification of your providers' cyber security has been carried out independently by an approved Certification Body.

SHARE IMPORTANT DOCUMENTS AND POLICIES

FINALLY HAVE ONE CENTRAL REPOSITORY FOR ALL YOUR MOST IMPORTANT COMPANY DOCUMENTS

Within every business, to remain compliant, it's critical to have company policies and documents which must be read by employees to ensure your business can operate correctly. This could be everything your employees legally need to know and can also include things you want them to know, which might be specific to your business, office space, and/or sector. The information in question could be in a document, such as a pdf format, or even video information, which then becomes your one-stop shop for all of your highly informative communications and policies.

Using shared online drives for this might seem like a good solution, however, there are some issues with this. As previously mentioned, security access is much more tricky to control within shared drives, meaning you're unable to control who can see which documents. You may also be finding that there are several different versions of the same document within the shared drive, making it confusing for staff to know which one is the correct one. This last point could also mean that any updates to documents aren't done on the correct version, leading to multiple different documents, none of which are accurate or up to date. With your HR software solution, you should be able to easily see who can access which documents, and control who can update them.

SHARE IMPORTANT DOCUMENTS AND POLICIES

Requiring staff to let you know when they've read or acknowledged documents can also add a helping hand to your reporting, and is something you can only really get with HR tech. This allows you to chase up anyone who hasn't read your latest policy or document to ensure everyone is up to date with the latest requirements. Notifying staff when a policy is updated, can also be key to keeping compliance on track, and is yet another feature you need within your HR tech solution.

## MAKE SURE YOU CONSIDER...

Version control

With the ever-changing rules and regulations within workplaces, or when working from home, you need to ensure your HR tech fully supports the versioning of documents and policies. This makes it simple for you to update the version and re-sharing with employees, either to read the updates or to read and acknowledge the latest version. A full history of previous version acknowledgments with data and time stamps retained for your records should also be available to you.

EFFECTIVELY REPORT ON YOUR EMPLOYEES

FILTER YOUR STAFF DATA AND CREATE POWERFUL REPORTS

Reporting on people management is critical to ensure businesses are diverse, pay scales are fair and staff wellbeing is being monitored. Not only that but any information you need to report on needs to be accessible; from absence and sickness reporting to basic employee information or salary data. HR tech solutions allow you to store all of your employee data in one place, providing one single source of truth. Without this, reporting could be an impossibly large task, with data being scattered across paper, spreadsheets, and shared drives. By allowing for employee self-service access, it can also mean that this data is up to date, meaning your reports are much more accurate than ever before.
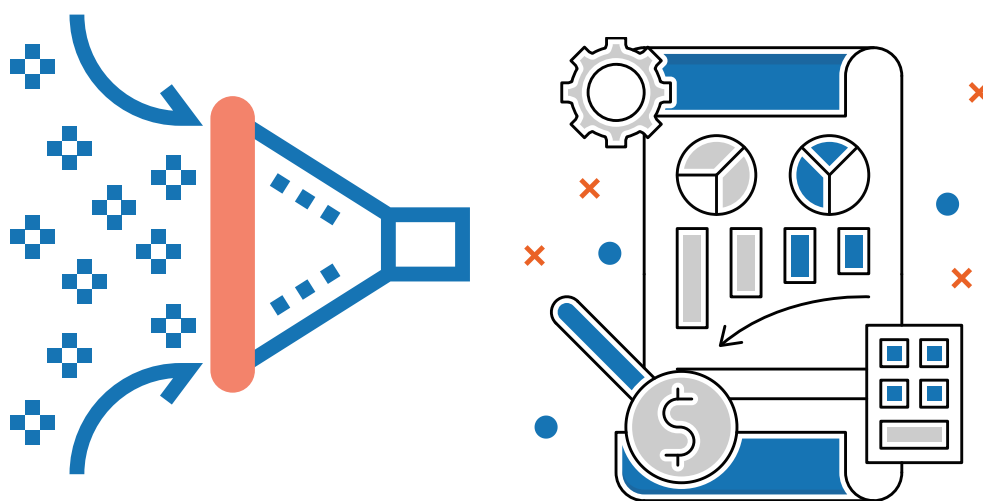
EFFECTIVELY REPORT ON YOUR EMPLOYEES

Filtering your data should be straightforward with an easy-to-use interface that can allow your staff to create these reports with ease. Sharing them to your colleagues or C-Suite should also involve little effort, with email notifications being able to be utilised to allow the right people to be in the loop on all your important reports. Having reports on a schedule also means they can run using automation, without you needing to log in, so if you're busy doing other work your report is still sent over.

MAKE SURE YOU CONSIDER...

The kind of data you're holding on your staff

As previously mentioned, GDPR is a legal requirement for all businesses to ensure they're adhering to. When you're holding and reporting on data about your employees make sure you follow the guidelines very closely to ensure that the information you have on your staff can not be deemed excessive or too personal.

MUST-HAVE INTEGRATIONS
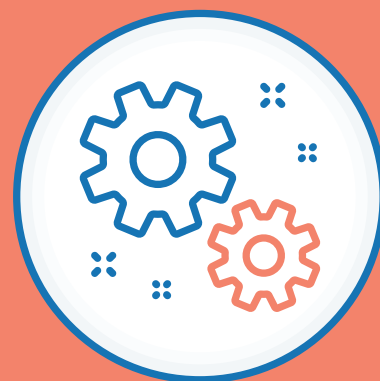
IMPROVE PRODUCTIVITY AND SECURITY

Integrations are a sure-fire way to ensure the productivity and security of your HR tech solution is optimised. In this section, we'll cover just a few specific recommendations for integrations that could really help your HR tech solution surpass expectations. In particular; Xero Payroll, collaborative working platforms, such as G Suite and Office 365, and applicant tracking systems such as LinkedIn Talent Hub.

Xero Payroll: Appogee HR becomes a single employee self-service portal for updating employee personal and banking information for both their HR and Xero payroll systems. Remove any cause for concern over data accuracy as staff are provided with a single entry point for personal profile data and absence information, and the updates should sync to Xero Payroll, with the correct HR solution in place.

Google Workspace (G Suite): Benefit from single sign-on, auto user provisioning, Google Calendar integration, auto out of office settings, and more by integrating with Google Workspace. Single sign-on can ensure your solution is secure and your staff can benefit from using their login credentials. Using the Calendar integration, you can automatically add leave and sickness requests to staff calendars providing more of an oversight for your teams to see who's off.

MUST-HAVE INTEGRATIONS

Office 365

Microsoft Office 365: Integrate your HR tech with your Microsoft 365 accounts to benefit from single sign-on, Outlook calendar integration, and Outlook web app for leave requests. Single sign-on can ensure your solution is secure and your staff can benefit from using their login credentials. Using the Calendar integration, you can automatically add leave and sickness requests to staff calendars providing more of an oversight for your teams to see who's off.
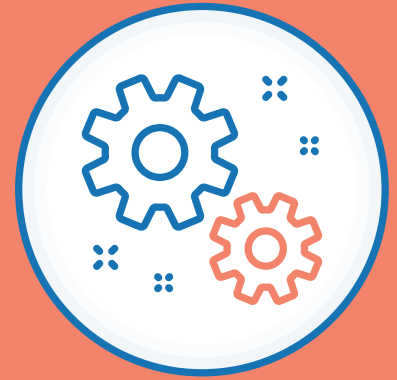
in Talent Hub

LinkedIn Talent Hub (Applicant Tracking System or ATS): Integrating with an ATS can ensure you and your candidate have the best experience from the hiring process and throughout your new hire's full employee lifecycle. The integration allows for 100% secure data transfer from LinkedIn Talent Hub to your HR solution meaning you can spend less time on manual data entry administration and more time focussing on onboarding your employee.

MAKE SURE YOU CONSIDER...

The potential need for an API (application programming interface) integration

As your business grows you may find that you need more technical integrations. An API can allow you to integrate with any other applications or websites and for the ability to extract and update data. With your HR tech provider being your new people management technology expert, they should be able to assist you with any requirements for an API integration.

MUST-HAVE INTEGRATIONS

Teamtailor: Appogee HR Software seamlessly integrates with the Teamtailor Applicant Tracking System (ATS) to ensure you can easily move your new starters from Teamtailor into Appogee HR. The hassle-free, 100% secure data transfer means you don't need to waste time on manual data entry and can instead focus on onboarding your new employees.

Greenhouse: Integrating with an ATS can ensure you and your candidate have the best experience from the hiring process and throughout your new hire's full employee lifecycle. The integration allows for 100% secure data transfer from LinkedIn Talent Hub to your HR solution, saving your HR team valuable time and reducing the risk of manual error.

DID YOU KNOW?

*69% of employees are more likely to stay with their employer **for at least 3 years** after a great onboarding experience?*

*SHRM

ADVANCING YOUR HR

ARE YOU LOOKING FOR MORE?

For businesses keen to advance their HR management, it may be that you need more features, in this section we provide a quick overview on what features are required.

Onboarding: Having an onboarding portal accessible before your new starters first day can be really beneficial in advancing your onboarding process. This is a great first step that can help your onboarding process really skyrocket, keeping them engaged and ensuring they feel welcome during the onboarding period, and even beforehand with pre-boarding. Allowing new hires access to all the need-to-know information about your company online before their first day will be really helpful to them from a practical standpoint, but also provides your new employee with a sense of inclusion. Should your new hire need to prebook leave, it would also be a good idea to make sure they can do this online as well as providing welcome emails and self-service access for all staff.

Company, Team, and Personal Goal Management: Tracking goals in your HR solution can be particularly beneficial for advanced people management. Using the Objectives & Key Results (OKR) method allows you to track your company objectives while also linking these to team or personal goals. In addition to this, having measurable key results, within a dashboard can help you and your team easily see where you're finding success and what areas need improvement.

MORE THAN 80% OF SMALL BUSINESS OWNERS CONFESS TO NOT TRACKING THEIR COMPANY GOALS*

*Boardview.io via Entrepreneur, 2018

ADVANCING YOUR HR

Employee Performance Reviews: being able to utilise the same software solution for performance, disciplinary, end of probation or any other kind of review can be really beneficial for a number of reasons.

Regarding the review process, being able to have this in-app essentially means that all of your performance reviews are located in one place, but also that each part of the performance review process is also enclosed in that area. This allows for consistency of all the different kinds of reviews throughout the organisation and for performance, the requirements you have for manager appraisal, employee self-assessment, 360 feedback, shout-outs, and reviews against goals, are collated in one area so you can refer back to anything you need to at your convenience. This also ensures you have an audit trail should you require this for any reason, particularly for anything disciplinary related.

MAKE SURE YOU CONSIDER...

The ability to upgrade your current solution

For your first steps into getting started in HR tech, the items mentioned in this section may not yet apply to you. However, looking into the long-term, it's important to recognise that you may need to ensure that you are able to upgrade your current solution rather than spending time researching new systems. Having your essential HR requirements in place with a solution you're happy with, which can also be upgraded to ensure HR success, is a definite plus point.

MANAGE YOUR HR FROM ANYWHERE

REMOTE WORKING AS THE NEW NORMAL

In these times, businesses have become aware of the importance of moving their business to the cloud, allowing all employees to work from home. Collaborative working suites like Google Workspace (G Suite) and Microsoft 365 have allowed teams to collaborate across documents, whilst CRM and Marketing Automation software are keeping commercial teams running smoothly. However, the most important business area that you must be able to manage remotely is your HR. With many businesses choosing to allow employees to work away from the office, it is important to have the technology to support this.

86% OF UK EMPLOYEES WANT TO WORK REMOTELY AT LEAST ONCE A WEEK*

Hubble HQ, July 2020
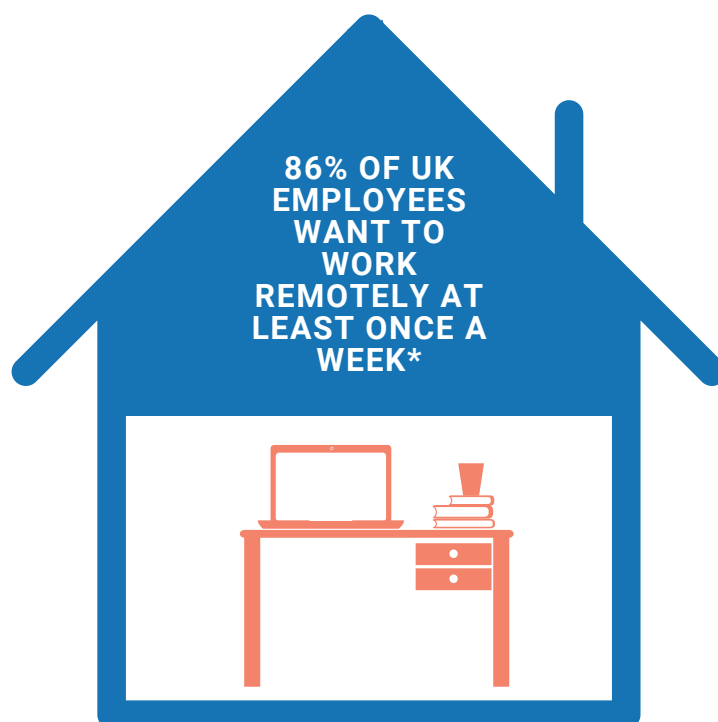
MANAGE YOUR HR FROM ANYWHERE

With an HR tech software solution in place, you can mitigate the risks from a people management perspective about having to run HR during periods of working from home. Regarding any hardware or requirements, being able to log different assets that your staff may have needed to take from the office, such as monitors or laptops, can ensure that you're able to keep track of all of these items in one place.

Even if you'd prefer your teams to work in the office, it's likely that you may have individuals with regional responsibilities, or a requirement to allow staff to request sickness from home. With many companies choosing to allow for remote working, having an HR tech solution in place can also help drive innovation to support this plan, even if it is only potentially a future requirement.
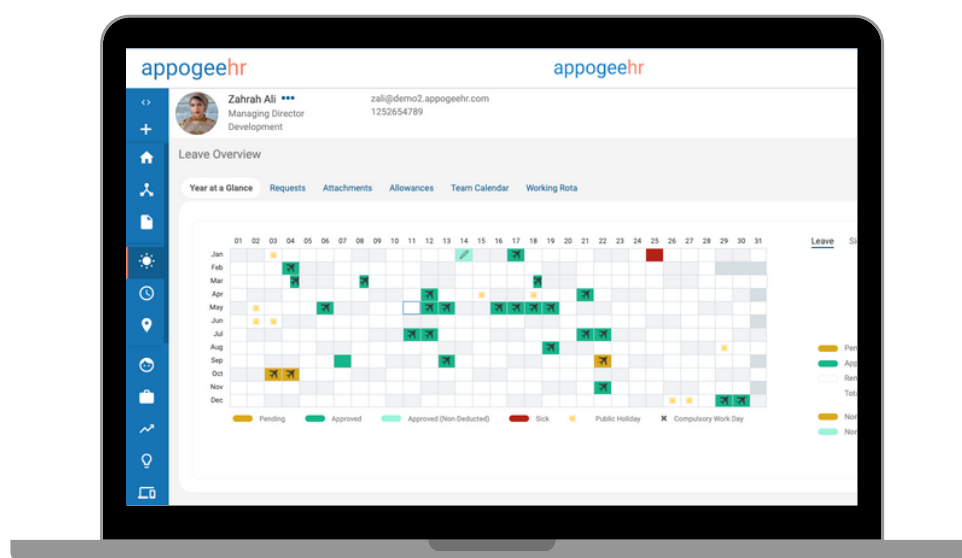
HOW TO GET STARTED

MOVING YOUR PEOPLE MANAGEMENT TO THE CLOUD CAN BE MUCH SIMPLER THAN YOU THINK

At Appogee HR, we provide a range of cloud-based solutions to support people management for small businesses

appogee**leave**	**Appogee Leave** provides you with simple, online absence management with employee self-service and manager approval. Allowing you to track and report on who is off sick, working from home, or any other kind of absence.
appogee**hr** essentials	**Appogee HR Essentials** provides you with core HR functionality allowing you to manage your HR admin.
appogee**hr** success	**Appogee HR Success** includes everything in Appogee HR Essentials but also allows advanced HR management, including employee performance with or without using Objectives & Key Results, our comprehensive employee Onboarding portal to kick start the employee journey, and much more. Please note that all of our solutions are securely stored in the cloud, with access you control, on Google's Cloud Platform.

Both of our Appogee HR solutions also include Appogee Leave.

To start with your 14 day free trial, visit www.appogeehr.com/trial

SERVICE & SUPPORT YOU CAN TRUST

At Appogee HR we understand the importance of providing excellent service to our customers and trialists. That's why we have a team dedicated to customer success to ensure you're getting the most out of your chosen product or package.

We offer free demonstrations to all trialists which can be requested in-app once you've started your trial or via our website. Optional Assisted Setup is also available for all our products which you can purchase in-app if you need it. For any of our larger HR customers, there's also the opportunity to receive a 'Health Check' which is a one-on-one phone call with a dedicated member of our customer success team, to talk you through using the system ensuring you're using it to the best of its ability, all of your options to assist you in getting the most out of your solution. They are also on-hand should you wish to explore upgrading your package through a demonstration.

If you're interested in finding out more about how Appogee HR implements assisted set-up or customer success, email **sales@appogeehr.com**.

Our service and support is highly rated!

To get started on your chosen solution today, please visit www.appogeehr.com/trial where you can try your chosen solution for yourself for free for 14 days. Alternatively, we'd love to help you decide which platform is right for you, give us a call on **+44(0)345 262 3003** or visit our website to book a demo at **www.appogeehr.com/demo-request-form** .

ABOUT APPOGEE HR

HR SOFTWARE TO HELP YOU MANAGE STAFF FROM WHEREVER THEY'RE WORKING. OUR EASY TO USE SOLUTIONS ARE TRUSTED BY OVER 800 BUSINESSES WORLDWIDE.

At Appogee HR, we provide innovative HR management systems (HRMSs) which include a range of products and packages to enable your people management to be as simple and effective as possible. Our goal is to free business administrators from the burden of paperwork.

We offer simple data integration with other cloud business applications, provide features that engage and empower staff, and help meet HR compliance requirements.

We have been developing Software-as-a-Service HR applications since 2009. Built on the highly scalable and secure Google Cloud Platform, our web-based HR management applications are used by over 800 businesses worldwide and require no server or client software installation.

Google Cloud Partner

UK EMPLOYEE EXPERIENCE AWARDS '20 FINALIST ™

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FIND OUT MORE

If you're interested in finding out more about HR tech for small businesses, get in touch with us today using the contact details below.

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