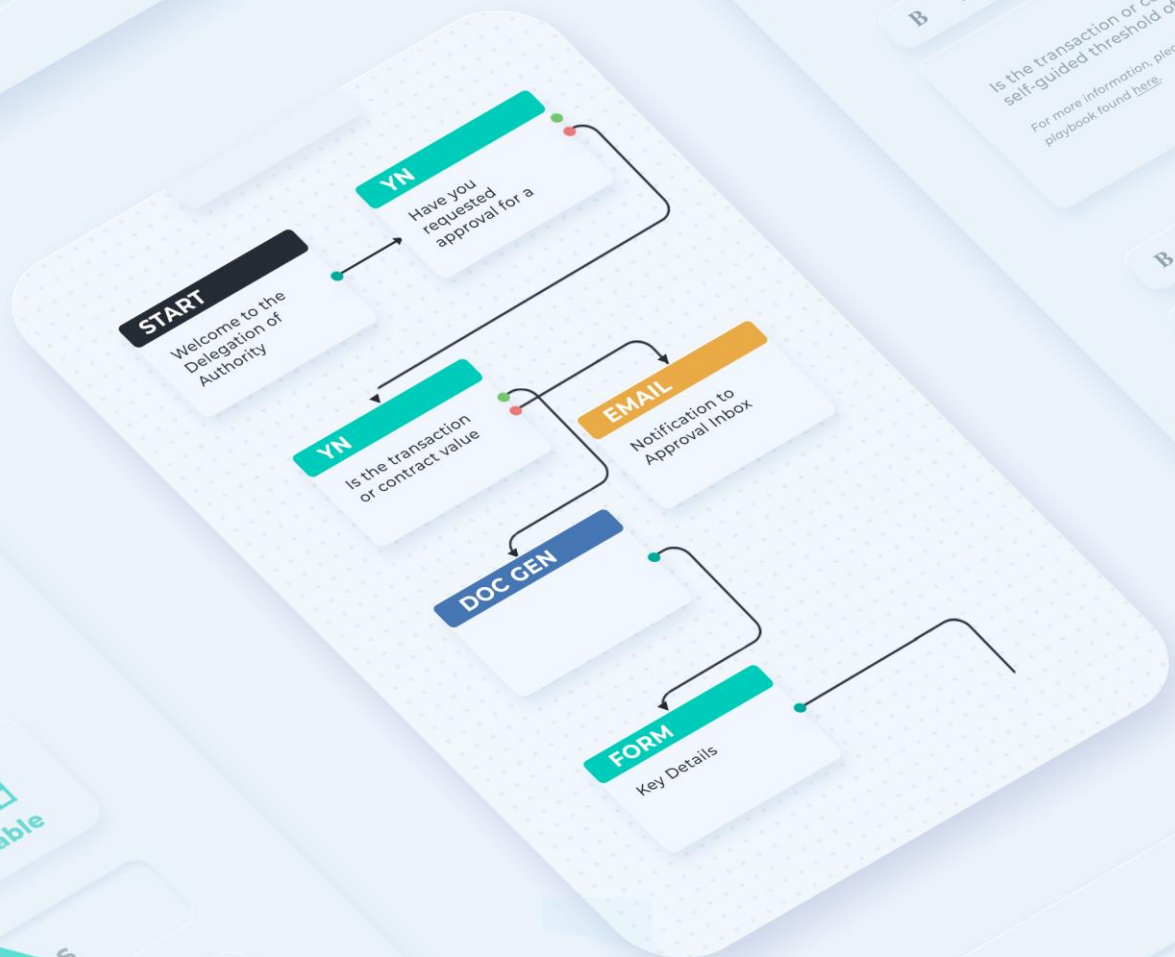




CHECKBOX



PEOPLE & HR

The Transformative Impact of No-Code

An insight into how modern HR teams create automation solutions easily and quickly without the need for IT.

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State of the Industry

INDUSTRY OVERVIEW

As a function that is traditionally responsible primarily for conflict resolution and employee relations, Human Resources (HR) functions world-wide have truly transformed into multi-faceted, strategic powerhouses critical to organizational success.

Specifically, the responsibilities of modern HR functions are spread across 5 core functions:

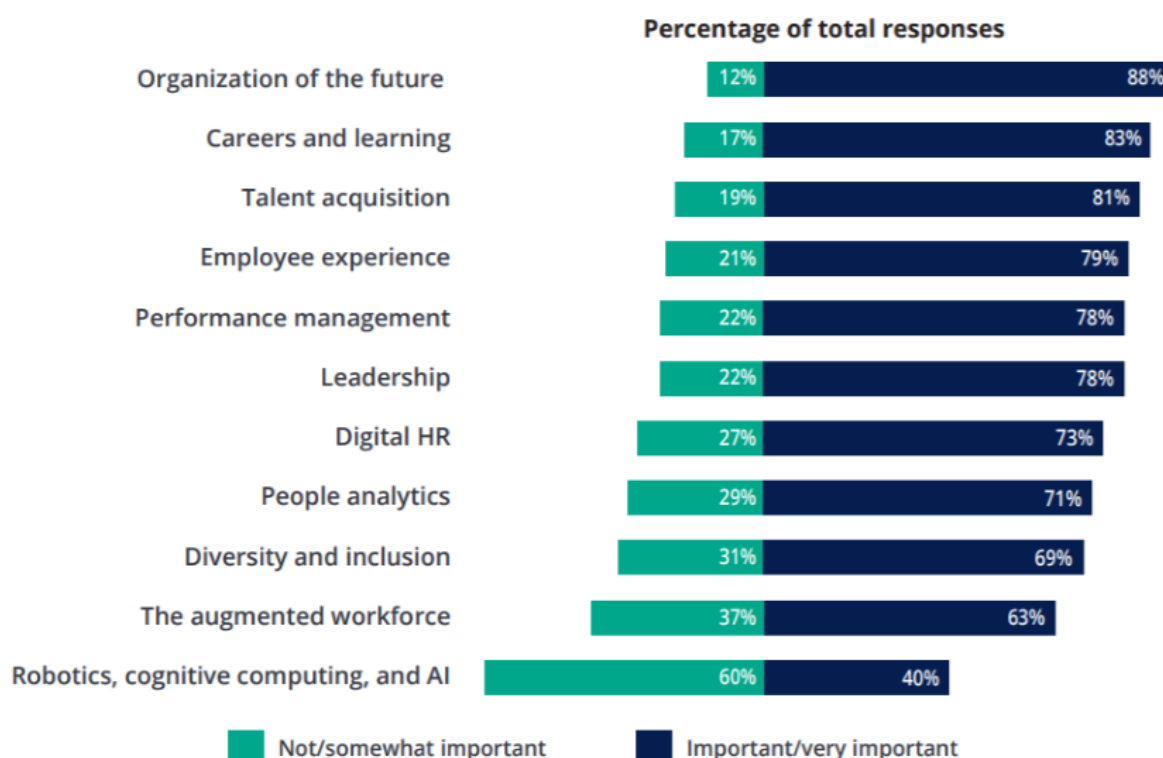
- 1) Staffing:** HR teams are responsible for the recruitment of new talent, managing the capacity and utilization of current staff and handling a range of administrative tasks associated with employee leave.
- 2) Development:** Of both individual employees and organization-wide skillsets and standards through learning and development initiatives.
- 3) Compensation:** Payroll, worker's compensation, fringe benefits and remuneration responsibilities are typically owned and managed by HR teams.
- 4) Safety and health:** This commonly includes managing an organization's regulatory obligations in terms of occupational safety and health standards.
- 5) Employee and labor relations:** Dispute resolution, employee engagement and perception management round out the list of core HR responsibilities.



Looking forward, industry and organizations are trending towards recognizing the importance of employee management. Over the next decade, HR departments are evolving to take on greater strategic responsibility both within and beyond these five core functions, translating to a direct growth in the emphasis placed on the role of HR within organizations.

THE FUTURE OF THE HR INDUSTRY

As HR functions continue to take on more responsibility, the role of technology is becoming a centerpiece in maximizing the efficacy of HR departments. Deloitte's Human Capital Management Report supports this finding, with at least five of the top ten industry trends directly referencing technology and technological growth.



Source: Deloitte Global Human Capital Trends (2017)

As organizations continue to require their HR teams to be more multi-faceted and people-centered, leading HR teams will continue to seek ways to efficiently manage their growing responsibilities and create stronger, data-driven HR strategies.



Role of Technology in HR

HR functions have been early adopters of technological solutions, with a view to maximize the employee experience and improve data-driven organizational insights.

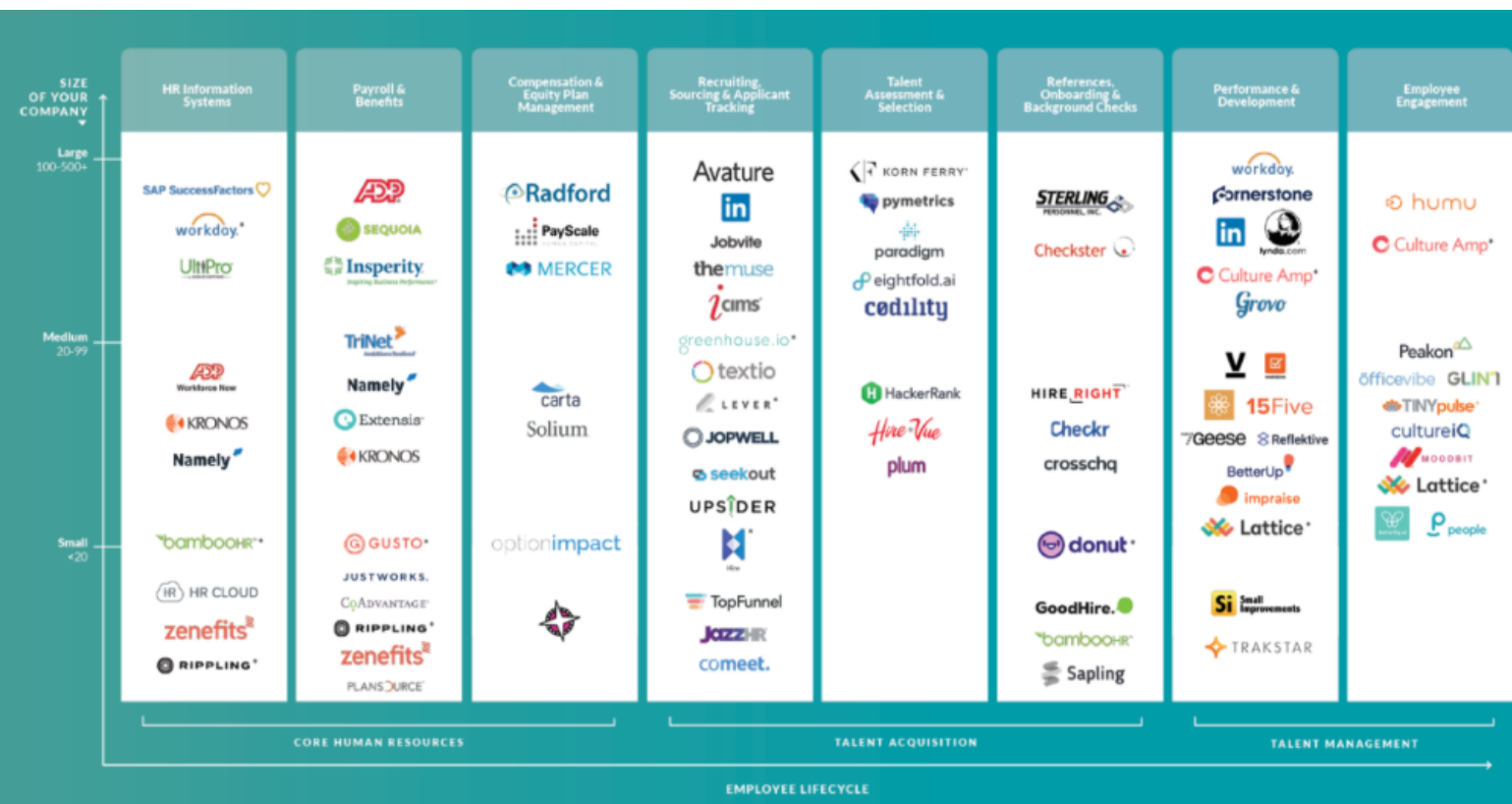
The most-used systems are Payroll Systems, HR Information Systems (HRIS) and Recruitment and Talent Acquisition Systems, corresponding to the main responsibilities of HR teams.

Larger organizations are more likely to have comprehensive tech stacks, with smaller organizations likely to supplement one or two core systems with more manual methods of practice, such as using spreadsheets and paper employment records.

What types of technologies do HR teams use?

The modern HR tech stack is characterized by its dependence on point solutions – highly specialized systems designed to handle one specific core function in HR, such as recruitment or payroll.





Source: Two Sigma Ventures (2019)

Because of this, the top end of the HR industry has traditionally been dominated by a few large, established brands like SAP (HRMIS), Kronos (Payroll) and LinkedIn (Recruitment). The competition is more diverse at the small and medium business (SMB) level, with slightly more generalist solutions such as BambooHR offering more cost-effective alternatives to large point solutions.

Overall, regardless of organization size, the point-solution nature of HR tech means that most organizations end up adopting and managing at least 4 – 5 separate tools to manage the diverse responsibilities of HR teams.

Click [here](#) to see how HR teams can remove the need for separate point solutions by adopting a single platform approach.



Key Challenges for HR Teams

ADMINISTRATIVE BURDEN

Despite their dynamism, HR functions are often perceived by executives and other functions within the organization as merely administrative, with little or no strategic impact.

A core reason for this is that despite their growing responsibilities, HR teams continue to spend a significant amount of time on repetitive tasks, making up approximately 50% of their workload (including Risk and Compliance requirements) as shown below.

This is supported by a study by Kienbaum, showing that HR professionals spend an average of 39% of their time on “tedious manual tasks”, including:

- Record-keeping of employee data
- Payroll management
- Creating, managing, and publishing job postings
- Drafting contracts, terminations, warnings, and references
- Calculating and tracking employee compensation, vacation and working hours.

Source: <https://www.personio.com/blog/why-hr-managers-are-spending-time-on-the-wrong-tasks>

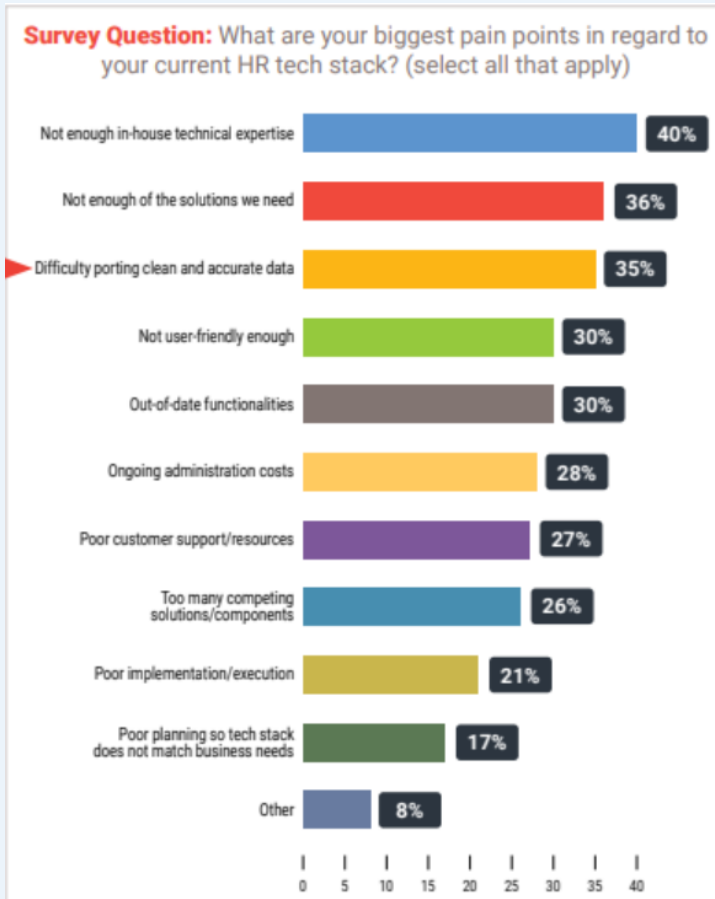
The current administrative burden on HR teams is double the optimal proportion of 15-20% and represents a missed opportunity in terms of maximizing the contribution that HR teams can make to organizational development.

Administrative tasks managed by HR take professionals away from areas where they can leverage their expertise to add value to an organization – namely human-to-human interactions with employees and organizational development strategy, which currently make up less than 20% of the workload of HR managers



INFLEXIBILITY OF EXISTING TECH STACKS

While many technological solutions exist to help HR teams manage their responsibilities, most teams find that their tech stacks are not meeting the unique requirements of their organizations.



Source: HR Research Institute (2020)

The top ten pain points of current HR tech stacks above, as researched by the HR Research Institute, indicate that the systems used in HR are inflexible and too technical to manage independently.

This resulting gap between existing technological solutions and organisational needs results in two key areas of friction for HR teams:

- 1) Organisational inefficiencies, as HR teams try to mold their processes to match the products in their tech stack or avoid utilizing their tech stack all together, with ongoing administration costs taking further time away from core HR work; and
- 2) Stagnating employee experience, where the pain points experienced by HR teams in utilizing their tech stack has a flow-on effect on HR's ability to enhance their engagement with employees.

Click [here](#) to read about how Coca-Cola Amatil overcame these challenges by automating their HR processes including Employee Letter Generation.

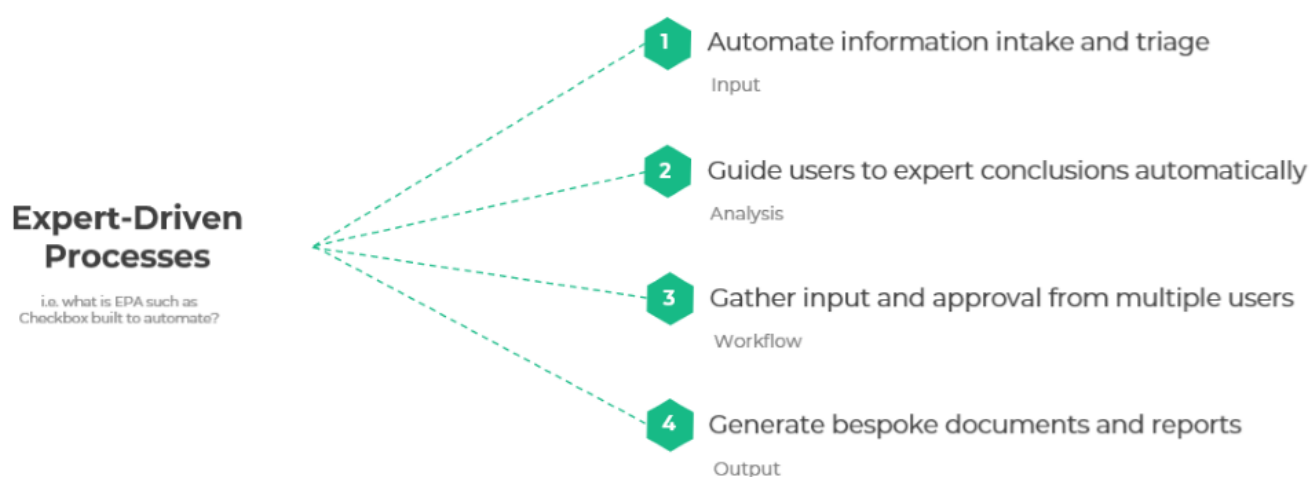


How Expert Process Automation Reduces the Burden of Manual Work

What is EPA?

Expert Process Automation (EPA) describes technology that enables the digitization and automation of expert knowledge and processes.

Specifically, EPA addresses the automation of four core elements of expert processes: intake and triage of information, rules-based analysis, workflow management and bespoke document generation.



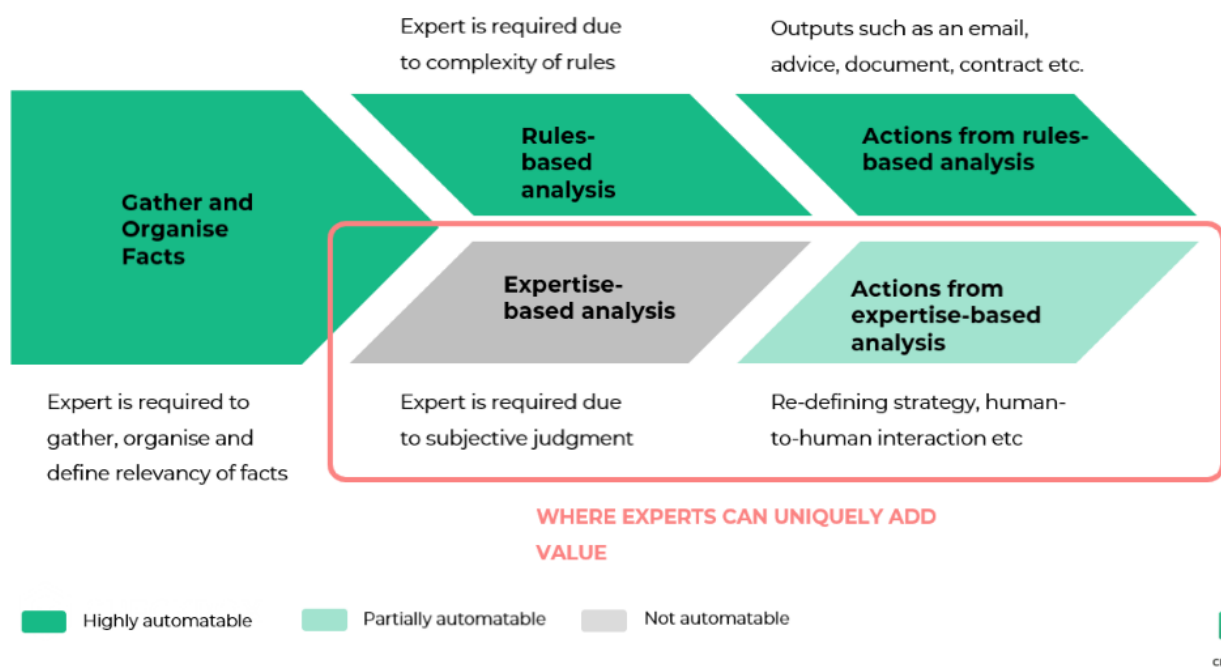
These areas are the most common types of manual, repetitive work that diverts experts away from more strategic value-adding work, representing an underutilization of expert talent and a missed opportunity for organizations.



How does EPA help HR teams?

EPA enables access to expert information at scale by empowering subject-matter-experts to build automation tools, bespoke to their organization. The foremost benefit of this is the improvement of service quality that HR teams provide to their organization. EPA solutions scale quickly and are available 24/7, providing a standardized, digitized and widely accessible HR experience for employees throughout an organization.

Moreover, by using EPA to allow the self-service of expert knowledge, HR teams are freed up to focus on areas where they can uniquely add value as shown below – namely human-to-human interactions and strategy-driven work.



This directly alleviates a significant portion of HR teams' administrative burden, enabling them to move towards the target range of 15-20% administrative work and re-purpose newly available time towards more rewarding and important work befitting the expertise of HR professionals.



How No-Code Platforms Address HR Tech Stack Challenges

No-code platforms represent the best opportunity for HR teams to implement EPA solutions within their organization. By empowering HR professionals to efficiently automate their expertise into bespoke EPA solutions, HR teams are able to quickly adapt to their dynamic work environments and fill in gaps where large traditional HR systems are not flexible enough.

What is a no-code platform?

No-code platforms empower business users to create and deploy apps using graphical drag-and-drop interfaces rather than having to write lines of code. This shortens the app deployment cycle by giving business users the ability to directly automate their expertise, rather than going through expensive and time-consuming traditional development cycles with IT teams or third parties.

How does no-code help HR teams?

The need for minimal technical expertise for no-code development directly addresses the most common pain-point HR teams face in relation to their tech stack - that over 40% of HR teams lack the technical expertise to manage and optimize the use of their tech stack.

Source:

https://www.hr.com/en/resources/free_research_white_papers/the-state-of-today%E2%80%99s-hr-tech-stack-report_keyibe9g.html



Crucially, no-code platforms act as a “blank canvas,” putting control back into the hands of HR teams in terms of both solution design and future iterations and maintenance.

The importance of this flexibility within HR tech stacks is reflected in the *2017 Deloitte Global Human Capital Trends Report*, of which a key finding was that “while cloud-based HR systems brought tremendous value to organizations, they are no longer enough. Today, HR teams are rethinking their solutions in the context of workflow embedded apps. This means using the cloud as a “platform” and building on it for company-specific needs.”

HR institute research points out yet another pain-point with traditional point solution-based HR tech stacks - that 36% of HR teams feel that their current tech stack has “not enough of the solutions we need.” No-code platforms give HR teams the ability to address and overcome this issue by being a generalist tool that can fill in the gaps in HR tech stacks without the cost and disruption of large system migrations.



Opportunities for HR Teams to Improve Agility through EPA & No-Code Platforms

Each organization has different HR needs, and therefore will naturally gravitate towards different applications of EPA and no-code platforms. However, the following four use-case areas represent “low-hanging fruit” - pre-eminent opportunities for HR teams to begin their digital transformation journeys using EPA and no-code:

1 Employee Letter & Agreement Generation

BUSINESS BACKGROUND

Employee letters and agreements are business-critical documents that are often manually administered by the HR team.

While it is common for this process to be managed using spreadsheets and mail-merges, this method still requires HR teams to engage in significant manual data entry which leaves room for human error and takes their focus away from the people and into the process.

Subsequently, the employee experience is impacted too, requiring employees to engage with HR through manual workflows in collecting information and signing documents.

Click [here](#) to learn more about automating Employee Letter and Agreement Generation or to access our pre-designed app template.



HOW CHECKBOX SOLUTION SOLVES FOR THIS

- Existing document templates can be easily 'codified' for Checkbox and uploaded onto the platform as an underlying master template which all documents are generated from.
- These master templates with pre-determined business logic can be rapidly incorporated into end-to-end workflows by HR teams and deployed to all employees.
- [Optional] Third-party system integrations can be used to bulk generate hundreds of documents in one go or kick off the information capture process from employees. · Employees are prompted to provide appropriate information required to generate the employee letter and agreement with intuitive forms and on-screen guidance.
- Bespoke employee letters and agreements are generated for employees and sent to relevant stakeholders for e-signature. · Finalized letters and agreements can be automatically stored in document repository systems such as Google Drive, SharePoint, iManage, or NetDocuments.
- All generated documents can be monitored and managed from a centralized dashboard where further analytics can also be drawn.

Key Benefits for Employee Letter Agreement Generation



Seamless information capture:
Complete employee information intake in minutes with an intuitive form-based digital interface.



Dynamic letter and agreement generation and approval:
Generate bespoke letters and agreements that are error-free and compliant every time, making approval easy and minimizing inefficient back-and-forth in the process.



Rapid bulk generation of letters and agreements:

Bulk-generate letters with just a few clicks to empower HR teams to maintain speed and accuracy through busy periods.



Intuitive digital signing:

Makes the document-signing process paper-less and painless, with native e-signature tools and in-built reminders allowing for quick and easy signing by all parties.



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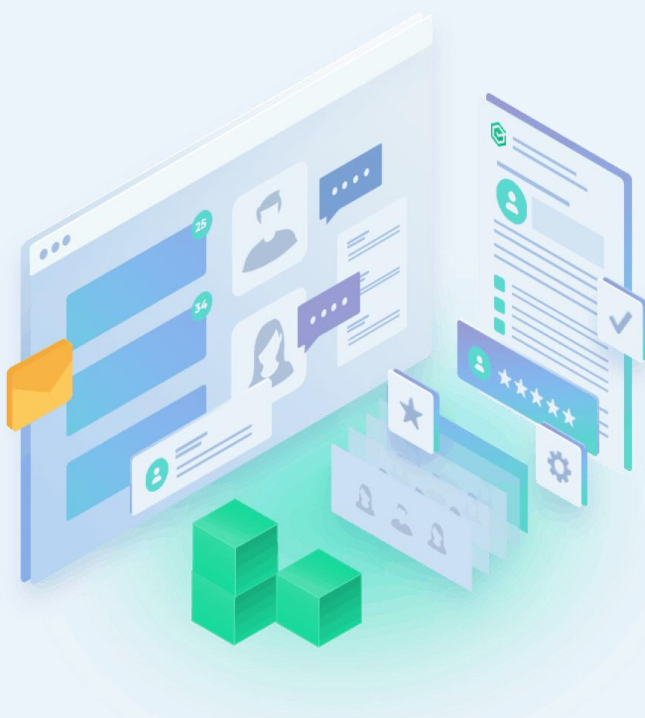
Employee Onboarding Management

BUSINESS BACKGROUND

The onboarding experience for employees is typically a complex process that leaves a lasting impression on new hires.

The friction for the HR team lies in the unnecessary time spent on capturing basic information and generating tailored documents which must be re-keyed into multiple other systems – a repetitive and error prone process. Involving multiple divisions including IT and Legal is also a manual process of back-and-forth emails and follow-ups.

Additionally, new employees often ask the same questions and any FAQs set up by the HR team in portals or other systems can be difficult to update and maintain.



Click [here](#) to learn more about automating Employee Onboarding Management or to access our pre-designed app template.



HOW CHECKBOX SOLUTION SOLVES FOR THIS

- Bulk send out onboarding packs with forms to fill, documents to sign and information packs via email.
- Employees are prompted to upload relevant documents and information with intuitive forms and on-screen guidance.

Key Benefits



Streamline and digitize the employee onboarding journey to save time:

Provide an intuitive onboarding journey for new hires and minimize the time required by the HR team to collect employee information, generate documents and re-key information into multiple systems.



Increase compliance:

Automate the process of following up with employees and ensure all employee data have been collected to complete the onboarding process.



Provide a better employee onboarding experience:

Enable the HR team to build tailored onboarding packs and self-service tools without having to use multiple different systems that create a disconnected user experience.



Oversee the onboarding progress:

All stakeholders involved in the process can track the onboarding status through dashboards. All information and documents can be automatically directed to the repository of choice.



Improve maintainability:

Through no-code, the solution can be easily and independently modified for any business or process changes.

- Automatically send reminders to prompt employees to complete specified portions of the onboarding process.
- Bespoke employee letters and agreements are generated for employees and sent to relevant stakeholders for e-signature.
- Upon e-signing, multiple divisions are involved to complete their part of the onboarding process with checklists and employee information.
- Finalized letters and agreements can be automatically stored in document repository systems such as Google Drive, SharePoint, iManage, or NetDocuments.
- Tailored surveys can be rapidly created or modified to hear employee feedback so the process can be improved each time.



3

Performance Management

BUSINESS BACKGROUND

The professional development of employees is essential for the growth of an organization, but employees and managers often find this process time-consuming, infrequent, and unstructured.

Most companies address performance reviews with spreadsheet based or heavy lifting HCM systems giving little opportunity to provide feedback outside the regular intervals. This leads to reliance on managers' memory of events.

Additionally, unstructured review processes can be unbalanced, with too much emphasis on negative feedback which can result in misalignment when setting goals and expectations.

Click [here](#) to learn more about automating Performance Management or to access our pre-designed app template.

HOW CHECKBOX SOLUTION SOLVES FOR THIS

- Employees access feedback and review tools through a centralized portal.
- In parallel, and with no visibility of the other's input, both employees and their managers are prompted to provide self-evaluation, feedback and upcoming goals before their in-person meeting.
- Upon completion, both direct reports and managers meet up to align on past and future KPIs through a formal 1:1 conversation.
- A customizable dashboard creates visibility for upper management to view the strategy and contributions of their team, enabling them to better craft business strategy.
- Aside from regular performance reviews, on-going and tailored performance management applications to encourage 360-degree, and project-based feedback can be rapidly built and maintained by the HR team.



Key Benefits



Streamline and digitize performance review processes to save time:
Moving away from tedious processes by automating manual data entry enables quick access to past feedback and performance reviews.



Tailored, structured performance reviews across the organization:
Rolling out standardized performance management processes allows for consistency in the quality of feedback.



The HR team can develop additional performance management applications that engages employees for 360-degree feedback, on-the-spot:
Empowering the HR team to rapidly build tailored, on-going performance review applications provides the opportunity for constant growth and goal setting.



Better shape organization strategy and decisions:
Monitor and manage all performance reviews at-a-glance through dashboards and full audit trails to gain valuable insight and support organizational efficiency at scale.



Recruitment Process Management

BUSINESS BACKGROUND

For many organizations, the recruitment process is handled manually without any purpose-built tools. Where off-the-shelf recruitment management systems are available, they tend to have gaps and are inflexible with addressing the requirements unique for each organization.

This leads to common challenges which include having to repeatedly write job descriptions in an ad-hoc manner for the same roles, lack of standardization of interview processes and candidate evaluation, and collecting and centralizing interview notes.

These areas tend to be ignored by the existing recruitment systems or require costly and lengthy customization to meet requirements.

Click [here](#) to learn more about automating Recruitment Process Management or to access our pre-designed app template.



HOW CHECKBOX SOLUTION SOLVES FOR THIS

- Existing interview guides or job description templates can be easily 'codified' for Checkbox and uploaded onto the platform as an underlying master template which all documents are generated from.
- These master templates with pre-determined business logic can be rapidly incorporated into end-to-end workflows by HR teams and deployed to all employees.
- Employees who want to generate bespoke interview guides and job descriptions are prompted to provide appropriate information regarding the new position, or an upcoming interview.
- Seamless workflows facilitate data collection, review and approval from multiple stakeholders, all in parallel with each other before the bespoke document is generated.
- All recruitment information and generated documents can be managed from a centralised dashboard where further analytics can be drawn.

Key Benefits



Quick to build and fully controlled by you:

The solutions can be built by HR professionals in a matter of days and are fully configurable. They can be quickly adjusted to requirements changes in a matter of minutes, as well as allow to inject your own unique company voice to increase adoption.



Increased efficiency and faster turnaround:

Reduction in time spent searching for past job descriptions and interview guides and manually creating (or re-creating) them from scratch. Faster turnaround of documents like job description and interview guides for hiring managers due to automation and self-serve.



Centralisation of data and documents:

Access all relevant historic data and documents as well as track reviews and approvals at-a-glance through dashboards and audit trails.





Checkbox as a No Code Platform

Simple yet powerful platform. A full suite of no-code app development features on a single platform.

The leading HR teams of tomorrow will be teams that leverage innovative technology to help them provide seamless, accessible, and highly personalized service at scale throughout their organization. Checkbox is the world's only no-code platform to specialize in EPA, enabling HR professionals to rapidly build and deploy solutions that automate away low value manual work and enable them to focus on high value strategic work.

CHECKBOX FUNCTIONALITY

Checkbox differs from other no-code platforms by offering a wide range of Lego-like blocks that can be drag-and-dropped to represent application functionality. This includes smart form-based data capture, complex document generation, end-to-end document execution capability, workflows (including complex parallel workflow), data driven dashboards, and enterprise system integrations. This is all provided on a single no-code platform to complement and fill-in-the-gaps of HR teams' existing tech stacks.



Checkbox Benefits

1

High ROI – Address wide range of use cases using one no-code technology platform:

With no-code platforms, HR teams can address a wide range of use cases all in one technology.

2

Rapidly build and deploy no-code solutions that are highly contextual to the business:

Using drag-and-drop, no-code platforms enable HR teams to customize their application to meet the needs of their internal business processes.

3

High maintainability of software:

Processes are constantly changing and being updated. No-code puts the power of amendments back into the hands of experts to help keep their applications relevant to the business.

4

Enterprise Grade SaaS Security:

Checkbox is SOC2 Type II certified and maintains high levels of security as a cloud vendor.

Want to find out how no-code can accelerate transformation in your organization?

We'd love to get in touch and have a chat – schedule a demonstration with our team [now](#).

