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Must have features:

IT AND OPERATIONS CHECKLIST FOR HCM EVALUATION

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In a business landscape that is constantly evolving, an HCM is the backbone of a company's HR technology. Not only does it centralize all HR data, but a good HCM is crucial for enabling personalized people management and driving great company culture.

And, as businesses face another year of uncertainty, it's vital that their tech creates efficiencies, supports resilient teams, and provides tools for the whole organization. No longer is the HCM a necessary tool for just the HR team alone, and no longer is it efficient for the business to use more than one HCM (although recent HiBob research reveals that 67 percent report still doing so).

Yet, according to the same research, only 23 percent of businesses believe their existing HCM enables them to tackle the complexity of global HR operations while remaining agile, and just 27 percent say that their HCM provides the data and automation needed for a modern, digital-first experience. In fact, recent reports reveal that 70 percent of HR professionals use three to six apps to complete a single task, significantly impacting productivity.

Plus, these inefficiencies affect the bottom line. Employees say they spend an average of 30 minutes longer on HR tasks than necessary, adding up to a massive 40 million hours a month. This costs organizations $8.15 billion annually in lost productivity.

The time to streamline processes has never been more acute: an integrated HCM can simplify complexity, drive greater efficiency, and impact business success.

But implementing new HR software is a huge undertaking for any company. From selection to investment to implementation, the process involves many people, including decision-makers and stakeholders. Although HR management will inevitably have a major role in choosing the right platform, it's also becoming increasingly common to get executive buy-in from the C-suite and other leaders across the organization, including several non-HR leaders.

Two non-HR leaders to consider including in your HCM evaluation are IT and operations. After all, these teams ensure the technical side of your HR operations runs smoothly, from data protection and security management to effective onboarding and annual leave allowance.

So, what are the things that matter to IT and operations when bringing in a new HR tool? What factors should your HR leaders consider on behalf of these teams when choosing a new platform? We've compiled a checklist to help answer these questions when evaluating an HCM.

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Why should IT and operations be involved in the HCM evaluation process?

There are many reasons why IT and operations should be involved in the HCM evaluation process from the outset. Most of these reasons pertain to data and security considerations to ensure your business does not put itself at risk of employment law liabilities.

One of the most significant changes for HR tech in recent years has been the "democratization" of HR data. Before, only HR professionals worked with people data regularly. Now, however, various groups have access to this data both inside and outside the organization.

Employees, managers, health insurers, compensation carriers, senior executives, and even regulatory agencies can access all sorts of people data. But with all these different types of users come different requirements. Some will need additional access permissions to edit and update, while others just need simple viewing rights. Others still may need access to the HCM as part of a more extensive automation process to fulfill their role, which requires initial setup and ongoing monitoring.

In addition to meeting the needs of a diverse range of users, an HCM should also accommodate several methods of access—both as a security measure and a consolidation method. Businesses are using more tools and platforms than ever before, which requires a high level of management and oversight to ensure they're streamlined and used to maximum efficiency.

No longer is it enough for HR professionals to manage all that this entails; while they still hold responsibility in handling the people element of an HCM, there is a requirement for high-level technical knowledge and expertise—and this is where the IT and operations teams come in. They can support the data and automation needed for a modern, digital-first experience.

The very concept of a modern HCM is that by investing in employees, organizations can grow their capital in the future—meaning that by choosing the right platform now, businesses can achieve their bottom line quicker. Your company will not achieve this at maximum efficiency unless you consider IT and operations in the decision-making process.

What are the key factors to consider from an IT and operations perspective?

For modern, mid-sized, multi-national companies, many different types of HRIS systems are on the market, but the best will adapt and scale with your changing needs. They will help your IT and operations managers tackle the ongoing technical challenges of a hybrid, global workforce. To ensure your potential new platform is technically competent and efficient (and able to scale as you do), there are some key features to look out for.

A good HCM needs to offer two key features: integration and automation.

The importance of integration

Integration with your company's existing tech stack is crucial. Suppose your company uses tools such as Slack, a learning management system, and an applicant tracking system. The HCM you choose should streamline the process of using all of these simultaneously rather than manually accessing each individually. Otherwise, this app overload erodes productivity and creates a frustrating experience for team members who need a simple and efficient way to handle routine processes.

Your IT and operations leaders need oversight and management over these various tools. A good HCM offers a source of control and ownership for these teams, simplifying the complexity of handling multiple apps simultaneously.

The HCM also needs to offer integration with an identity provider (IdP). An IdP stores and manages users' digital identities for digital and cloud-hosted applications. An IdP may check user identities via username-password combinations and other factors or simply provide a list of user identities that another service provider (like an SSO) checks.

Without an IdP, the HR platform is essentially just a system of record with information about employees, but it cannot be used as a single source of truth. The best HCMs on the market act as a single source of truth—providing the necessary and relevant information to the right person at the right time.

Efficiency through automation

IT and operations should be able to rely on the HCM to be entirely accurate and up-to-date, so they can take important attributions from the platform, push them through to their IdP, and continue their work from there. This seamlessly synchronizes the technical requirements of the IT and operations teams with the HR requirements of the people team, with access on both sides, in processes such as onboarding and offboarding.

Say your company hires a new team member. The HR manager may upload them to the platform, automatically allowing the IT manager to create an update in the IdP. For example, if someone has an agreed start date, the HCM might be automatically set up to send a "welcome" notification 14 days before their start date. However, the IT manager may choose to send this notification three days before, or perhaps 21 days before. In either case, the HCM needs to be flexible, provide various levels of admin access, and sync seamlessly with any existing tech stack.

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What are IT and operations' main concerns?

Any business' main concern is potential employment law liabilities, and this is particularly pertinent when it comes to HCMs as they hold a vast amount of sensitive data. There are all sorts of employee personal identifiable information, from finances and salaries, to addresses and phone numbers—and this information can potentially be used for identity theft, fraud, and other malicious activities.

Secondly, HCMs often integrate with other corporate systems, such as payroll and benefits, which makes them a tempting target for attackers.

Your company can get into serious trouble if this data is compromised in any way, so it's imperative that this information is safe and secure. A recent study by the Ponemon Institute found that the average data breach cost for organizations was $148 per record, with a total average cost of $15 million.

Ultimately, it is the responsibility of the IT department to ensure that any tech used within the business is compliant with legal regulations and to monitor this on a regular, ongoing basis in case of any breaches. When evaluating a new HCM, ensuring that it minimizes any potential threat—and knowing what to look out for—is key. In fact, not giving this due diligence could make or break your company. This is where the IT and operations teams step in.

Another important consideration when evaluating an HCM platform is ensuring it offers user-adjustable optimized access privileges, but simultaneously fulfills security regulations and covers all access information checks. This means giving people particular roles and access within the system without compromising private or sensitive data.

As an IT or operations manager, this means having visibility over certain things within the HCM to assist with automation and integrations. Without this access, you limit the capabilities of the IT managers and leave admin access all in the hands of the HR department. So, when evaluating a new HCM, it's crucial that it can offer user-adjustable access and privileges—particularly so that IT and operations can manage the technical side of things without having to compromise data or rely on the HR team.

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Your sample IT and operations checklist

Choosing the right system for your organization can be a make-or-break decision, but one thing's certain: by including your IT and operations teams in the evaluation process, you have a better chance of making the right choice.

This HCM requirements checklist will take you through all the must-have features of an HCM from the perspective of your IT and operations team. Use it as a reference the next time you weigh up your options. Does the HCM offer:

Technical integration:

- [ ] Full integration with the existing tech stack
- [ ] Interconnected apps for isolated tasks that integrate easily into the HCM
- [ ] Easy data import and export (CSV, PDF)

Technical accessibility:

- [ ] Employee and manager self-service portal
- [ ] Mobile-friendly access
- [ ] Manager tools that streamline workflows
- [ ] Single sign-on for HR applications
- [ ] A shared source of employee data
- [ ] Personalized pay options
- [ ] Chatbot technology
- [ ] Workflow automation to increase efficiency
- [ ] Language preference options

Compliance:

- [ ] Features to help comply with ever-changing regulatory requirements
- [ ] ISO standards
- [ ] EEO adherence
- [ ] GDPR compliance
- [ ] Payroll and tax compliance

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Data security and privacy:

- ☐ Global privacy and data protection
- ☐ Push technology for security alerts and updates
- ☐ Critical incident response
- ☐ Operational risk management
- ☐ Fraud and diversion management
- ☐ Descriptive error message if a data entry or operational error occurs
- ☐ Automated backup procedures to prevent loss of data

Data insights:

- ☐ A centralized dataset for your HCM metrics
- ☐ Cloud-based data to minimize costs
- ☐ Digestible data visual formats
- ☐ Configurable analytics for custom insights
- ☐ Industry-wide insights for benchmarking
- ☐ Integration with other business metrics
- ☐ Predictive analytics to create forecasting models

General—productivity/efficiency:

- ☐ Options for customizing the product
- ☐ Automation of any processes currently being manually performed (e.g., data sharing)
- ☐ Administrative efficiencies to reduce costs
- ☐ Streamlined process to improve efficiency

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Why choose Bob over other HCM solutions?

We know how important it is to make holistic, data-driven decisions about your people, especially in light of today's modern workplace changes. That's why we built Bob, an HCM that simplifies the complexity of HR.

Bob is developed to work seamlessly alongside the requirements of your IT and operations departments and will:

- **Integrate and customize to your needs**
Streamline tool usage and the transfer of data with integrations to the current tech stack for easy onboarding. Plus, Bob's highly-flexible and customizable platform ensures your unique company needs are met.

- **Automate processes and track trends**
Create workflows and automated reporting to save time. Bob's HR analytics generate instant HR reports using real-time data and track analytical trends, employee usage, and more.

- **Remain secure and compliant**
Meet security demands, apply complex workflows, and remain compliant at the local, state, and federal level. Bob ensures your data is organized, accessible only to the relevant stakeholders, consistent, and accurate while supporting clarity and transparency with employees.

- **Leverage a modern, digital-first experience**
Bob's web and mobile app creates a modern, streamlined experience for all users. A beautiful UI/UX makes using Bob as easy as using popular social media platforms.

- **Collect data to enhance a holistic strategy**
Every interaction with Bob breeds more data that can be easily turned into reports for HR, managers, leadership, and more. Use pre-made dashboards or create custom reports to ensure you're aligned with a larger strategy for engagement and retention.

Meet Bob

An HR platform such as Bob offers a one-stop-shop for all things people. It sits at the center of your HR ecosystem, is fully customizable, and grows with your organization.

In a short time, Bob can be deployed to enable communication, collaboration, and connectivity that drives stronger engagement, productivity, and business outcomes.

For HR

it delivers automation of many common processes, allows greater oversight and visibility of the business, and centralizes all people data in a secure, user-friendly environment.

For managers

It provides access to data and insights to help them lead more effectively and streamline processes.

For employees

It's the tools and information they need to connect, develop, and grow throughout their journey.

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