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Estimating the return on investment of a human-capital management solution for various human resources tasks

December 2020

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Executive summary

As organizations manage constant disruption, the role of Human Resources (HR) has become increasingly critical. Rather than merely being a function of process and operation, HR must lead the business in shaping the future. To achieve this level of influence, technology and a digital mindset are imperative; efficiency and effective HR operations are table stakes and must be built on a foundation of a modern, tech-enabled Human Capital Management System (HCMS). Investing in this technology is often a significant business decision for the enterprise. It includes building a business case (an understanding of the return on investment the implementation will bring) and a case for change (an understanding of the potential value that will come from the strategic enablement of the system).

To quantify the return on investment (ROI) of this system and to understand some of the additional value that an HCMS can enable, a survey was conducted with experts across the HR field. Included in this report are the key insights and data collected in the survey as well as background information on the goals and objectives of the effort, information on the participants, and the questionnaire and methodology.

The survey was broken out into ten sections, and each focused on one of the critical functions an HCMS can play. Insights from experts in the HR field were collected through a three-pronged approach: sourced through market research panel providers, Deloitte clients, and Paylocity customers. To qualify for participation, respondents were required to be self-identified experts in the field, working for companies headquartered in the United States, and familiar with numerous common core HR tasks and responsibilities of HR. More than 1,450 respondents provided data for each of these core HR responsibility areas.

The survey results highlighted a significant opportunity for cost savings across each of the responsibility areas given the manual effort currently that each task requires and the potential for further automation in each core responsibility area. Based on the average frequency reported by respondents, and the cost of labor for each task, the average potential savings for each core area is included below:

Results indicate that the Payroll and Tax tasks have the greatest potential for savings, with the Time Management tasks and Communications and Engagement tasks also having significant potential. Results often varied across industries, and in those instances, the variations were highlighted in that core HR area.

Introduction

In the face of nearly constant disruption and with the critical responsibility of driving business impact through Talent, HR has no choice but to continue to evolve. No longer can HR afford to sit in the traditional silos of the function, simply playing a supporting role and primarily operating as a processor. The "process over people" mentality will not work; the future demands a more strategic role.

As businesses have grappled with the ever-increasing pace of change, many organizations have realized the potential for HR to play a significant role in creating value. For many, HR has started to step into this elevated position, taking a seat in the C-suite and at the boardroom table; however, more must be expected to truly realize the function's potential. How that elevated role is established and what that role entails may look vastly different for every organization but, in the end, the goal is the same: it is more than just a seat at the table; it is a leadership role with both a voice and hand in shaping the future of the organization.[1]

As articulated recently by Deloitte Global leadership in a memo to HR, "The future of HR must be one of expanded focus and extended influence: expanding its focus to encompass the entirety of work and the workforce, and extending its sphere of influence to the enterprise and business ecosystem as a whole."[2] In the same way that organizations have had to expand their scope of influence from traditional ways of operating (focused primarily on profit and revenue growth) to the social enterprise—expanding their purview to consider how their mission, purpose, and activities not only impact but also contribute to, their environment and stakeholder networks.[3] HR must now expand its sphere of influence to the entire enterprise and ecosystem.[4]

Figure 1: Opportunities for HR to take the lead, helping enterprises to reimagine the future—today[5]

The future of **enterprise**	The future of **workforce**	The future of **how work gets done**
Sense the community and shift to become a **social enterprise**	Curate an inclusive workforce with **nontraditional talent**	Reimagine the work across the enterprise and HR with **digitalization** and **automation**
Drive innovation and agility through **workforce development**	Organize the **workforce experience** to invigorate teaming and productivity	Leap to a **fit-for-purpose HR operating model** to suit the enterprise
Extend the enterprise with a **partnership ecosystem**	**Forecast future capabilities** and enable continuous learning	Advance the **workplace** to enable workforce collaboration

HR must step into a new future by shifting in four areas:

Mindset	**Focus**	**Lens**	**Enablers**
Transitioning toward the future by adopting new traits and behaviors to thrive in the digital age.	Driving value through customer-centricity and human-centered solutions.	Breaking away from traditional HR operating models in favor of dynamic ways of working that are fit-for-purpose to achieve work outcomes inside an enterprise's values and culture that flexes to dynamic business needs.	Deploying advanced technologies focused on creating productivity and simplicity of experience through a unified engagement platform.

In order to achieve that level of strategic influence, the HR function must operate with efficiency and effectiveness. These are modern HR table stakes, driven by continuously evolving technology and automation, and are expected by the enterprise. A digitally-focused mindset, advanced enabling technologies, and simplified, nimble ways of working are foundational in driving business outcomes.[6] Without this foundation, the transformation cannot happen. This foundation allows HR to grow its capability (e.g., shifting current ways of working from simply the maintenance of back-office data to driving front-office insights, from working *in* the business to working *on* the business—and from operating as a generalist to operating as a guide).[7] In fact, the Deloitte High Impact HR research

has revealed that, compared to their low-performing counterparts, high-impact organizations are 1.9 times more likely to collect, manage, and analyze workforce data to generate talent and business insights; twice as likely to install a digital mindset, and 2.1 times more likely to test and apply new technologies to redesign or simplify—not just automate—how work gets done.[8] Ultimately, these high-performing organizations use technology and data to harmonize the work, workforce, and workplace in real-time.[9]

Unfortunately, structure alone does not create this radical change. These changes evolve from numerous drivers, including leadership, mindsets, governance, capability, and adaptability, all enabled by becoming a fully digital organization.[10] And, according to the 2019 Deloitte Human Capital Trends report, this is still a challenge that many have yet to resolve, with only 5% of survey respondents reporting a fully integrated HR cloud platform. Instead, most have some combination of cloud and on-premise software, and nearly one-third of respondents have no systems at all.[11] HR clearly has a critical role to play in the future of the enterprise, and this revolutionary change into dynamic and digital ways of working requires an investment on the organization's part. As articulated in a recent paper by Deloitte leaders, "a platform is an essential enabler of an adaptable, human-focused HR operating model, integrating the array of technologies so critical to driving productivity and creating a compelling workforce experience."[12] It is clear that a fully integrated, modern HCMS is foundationally critical for driving the dynamic and digital future but, for many, in order to allocate the resources needed from a cost and time perspective, two criteria must be established:

1. The business case: This is an understanding of the true ROI of what the investment will bring when it comes to the cost of labor saved over time from the implementation and maintenance of an HCMS.
2. The case for change: This articulates the less quantifiable, but equally as critical, benefits of an HCMS. It includes the potential for driving value through strategic enablement.

An organization will only be able to understand the exponential value that it can derive from, and make a case for, the investment once it has clearly articulated the needs and benefits of an HCMS implementation. This body of research strives to help organizations to do just that, helping to quantify the business case and underscore some of the most important considerations in the case for change.

Project background and approach

Recognizing the potential for both driving value through cost savings and strategic enablement in HR, Paylocity and Deloitte partnered to gather data from experts in the field of HR to truly articulate the ROI for an HCMS.
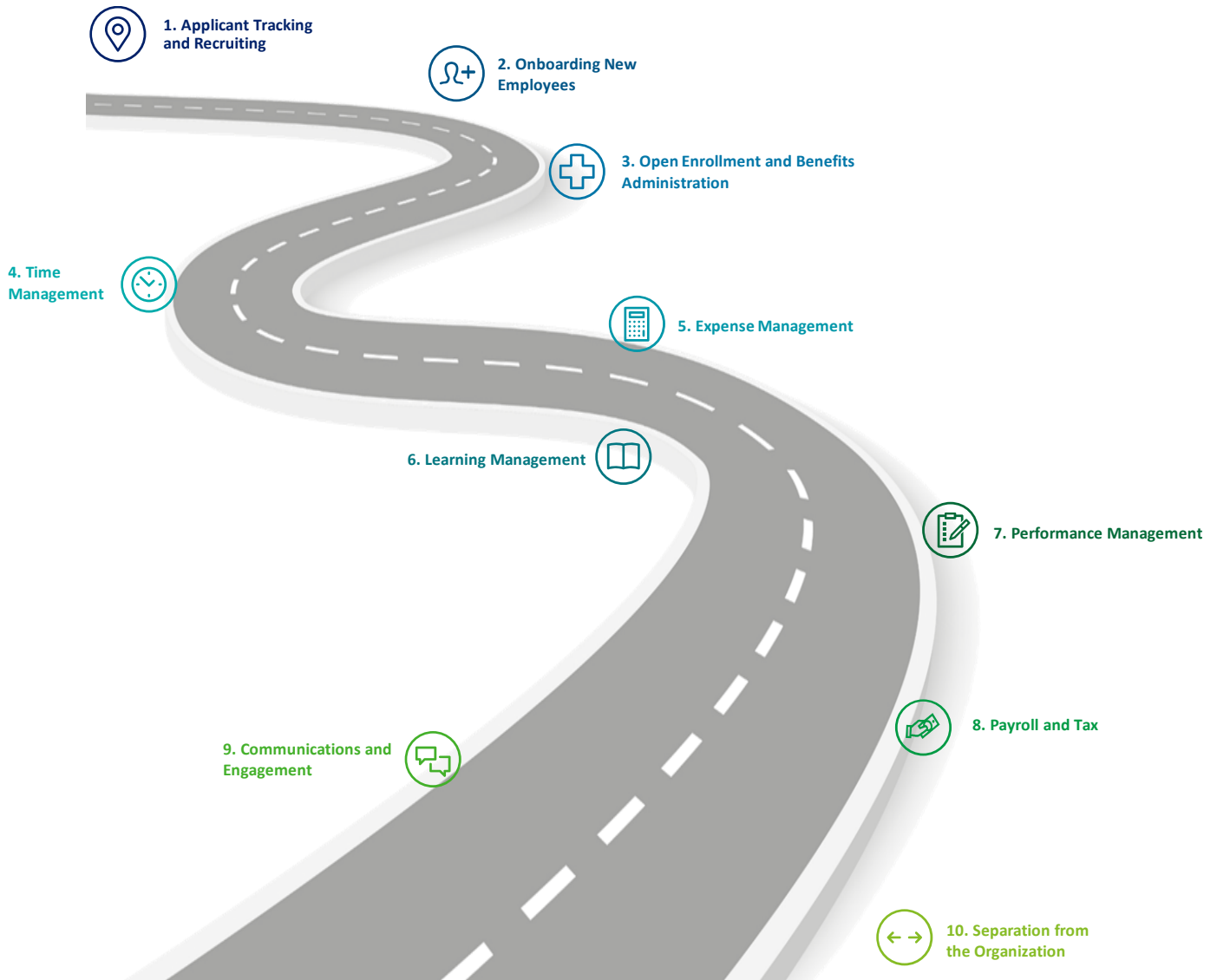
An HCMS is software that combines processes and systems and helps to manage everyday HR needs, as well as store HR data. This foundational technology enables both cost savings within an organization by increasing efficiency and decreasing the cost of labor, but also drives value by creating the opportunity to elevate HR into becoming the more strategic leader within the organization.

To understand and quantify this value, data from experts in the HR field was collected through a three-pronged approach: sourced through market research panel providers, Deloitte clients, and Paylocity customers. In order to qualify for participation, respondents were required to be self-identified experts in the field, who work for companies headquartered in the United States, and are familiar with numerous common HR tasks and responsibilities. More than 1,450 respondents provided data for each of the key HR responsibilities identified.

Core HR responsibility area	Number of participants who provided data for at least three questions	Number participants who fully completed the questions for the section
Applicant Tracking and Recruiting	1,352	585
Onboarding New Employees	1,849	980
Open Enrollment / Benefits Administration	1,474	706
Time Management	1,424	837

Core HR responsibility area	Number of participants who provided data for at least three questions	Number participants who fully completed the questions for the section
Expense Management	1,380	606
Learning Management	1,405	596
Performance Management	1,361	590
Payroll and Tax	1,435	900
Communications and Engagement	1,400	613
Separation from the Organization	1,402	575

The following are the common HR tasks and responsibilities identified for the purpose of this effort:

1. Applicant Tracking and Recruiting

2. Onboarding New Employees

3. Open Enrollment and Benefits Administration

4. Time Management

5. Expense Management

6. Learning Management

7. Performance Management

8. Payroll and Tax

9. Communications and Engagement

10. Separation from the Organization

1 Applicant Tracking and Recruiting

- Posting an open position
- Scheduling a candidate interview
- Collecting & storing a candidate's information, resumes, etc.
- Collecting hiring approvals of a candidate
- Extending a formal offer to a candidate
- Creating a report of open positions across the organization
- Identifying employees where a stay interview should be conducted
- Conducting a stay interview with an employee

2 Onboarding New Employees

- Entering employee, I-9 information in the HRIS system
- Entering employee contact information in the HRIS system
- Entering employee W-4 and other tax form information in the HRIS system
- Entering employee direct deposit information in the HRIS system
- Entering employee employment agreements in the HRIS
- Entering applicable employee professional certifications in the HRIS or other data repository
- Running analytics & reporting on onboarding progress

3 Open Enrollment and Benefits Administration

- Providing summary plan documents to an employee
- Communicating a benefit plan change to employees
- Providing an employee with the ability to compare benefit plan options
- Processing benefit plan changes for an employee
- Obtaining dependent eligibility confirmation for an employee
- Communicating open enrollment timeline and windows/key dates to employees
- Processing a new hire/qualified life change enrollment (out of the open enrollment window)

4 Time Management

- An employee entering their timecard
- A supervisor collecting an employee timecard
- Ensuring accuracy of an employee timecard
- Reaching out and receiving missing/incomplete timecard information
- Submitting a PTO request
- Calculating an employee's PTO balance
- Approving or denying a PTO request, including communicating outcome to employee
- Tracking Family Medical Leave Act (FMLA) or other leave times for an employee

5 Expense Management

- Submitting an expense for reimbursement
- Submitting receipts/substantiation for expense
- Tracking and calculating a mileage reimbursement
- Reviewing supporting documentation for an expense request
- Communicating expense approval/denial to employees
- If expense is approved, submitting it to payroll for the next cycle

6 Learning Management

- Scenario 3: Learning Management
- Registering an employee for an in-person training session
- Registering an employee for a virtual training session
- Tracking required training progress for an employee
- Creating and sending training materials for an employee
- Providing an employee with access to historical training records
- Tracking renewals for professional certifications/regulatory requirements for an employee

7 Performance Management

- Completing performance review forms for a direct report
- Organizing and storing performance data for an employee throughout the performance review lifecycle
- Providing an employee with information related to promotion or separation of employment
- Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.)
- Processing changes and updating a record for performance management (PIP, write-ups)
- Running analytics and creating a report for the performance management process

8 Payroll and Tax

- Processing payroll
- Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)
- Determining and calculating federal and state income and social security taxes
- Determining and calculating the employer's social security, unemployment, and workers compensation payments
- Responding to an employee's question or request regarding payroll
- Determining and calculating tax credits authorized through a legislative change
- Ensuring compliance when a regulation changes
- Creating a payroll report
- Creating a headcount report
- Creating a labor distribution report

9 Communications and Engagement

- Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)
- Collecting qualitative and/or quantitative feedback from employees
- Executing an engagement survey
- Sharing and distributing data from an engagement survey (e.g., cascading manager reports)

10 Separation from the Organization

- Processing COBRA, retirement, and other benefit issues at separation
- Recording and filing reason for employee separation
- Creating and executing employee exit interview or survey
- Recording and tracking exit interview data
- Calculating final pay at employee termination
- Terminating access to company systems/facilities
- Promoting or transferring an employee into open spot

The goal of the data-collection exercise was to determine …

(1) Automation potential for each task
- *Current level of automation in place*
- *Potential for further automation*

(2) Completion time for each task
- *Time required to manually complete the task*
- *Time required to correct errors for each task*

(3) Labor cost for each task
- *Typical individual responsible for each task*
- *Rate of pay for the individual responsible*

and therefore, the *potential savings associated with further automation*.

Building the business case

Before undertaking any sort of investment of time or financial resources, organizations have to build the business case—especially when the investment is potentially significant, such as in the case of implementing or replacing an HCMS solution. The business case must help to articulate the degree to which resources can be saved over time or, in other words, the ROI that will come from the implementation—from eliminating the labor efforts and, therefore, the labor cost associated with completing each task both now and in the future. The next section strives to articulate what this potential cost savings could look like for each of the common HR responsibilities and tasks identified as a part of this effort.

Applicant tracking and recruiting

The applicant tracking and recruiting responsibilities within the HR function typically include all the tasks associated with identifying and vetting potential candidates for open positions, both internal to the organization and external to the organization. HR representatives often complete aspects of each task that are not automated. Figure 4 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

According to survey data, these responsibilities have an average potential for automation of 69%, though most organizations have just 48% automated, meaning there is a significant opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that posting an open position and collecting and storing a candidate's information, resumes, etc., are the two areas most likely to be automated currently, with organizations seeming to have less technology-driven processes for both conducting stay interviews and identifying employees for whom those should be conducted.

Figure 4

Task	Applicant tracking and recruiting	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Posting an open position	59%	76%	4.12	32.21
2	Scheduling a candidate interview	45%	67%	6.91	29.81
3	Collecting and storing a candidate's information, resumes, etc.	57%	76%	7.68	37.08
4	Collecting hiring approvals of a candidate	49%	70%	5.22	30.28
5	Extending a formal offer to a candidate	46%	67%	5.96	29.13
6	Creating a report of open positions across the organization	51%	72%	5.30	32.26
7	Identifying employees for whom a stay interview should be conducted	40%	63%	4.73	27.54
8	Conducting a stay interview with an employee	37%	59%	5.85	42.34
	Average	**48%**	**69%**	**5.72**	**32.58**

The data shows that on average, tasks required for applicant tracking and recruiting are completed approximately six times per week, and the average time per task requires approximately 33 minutes; there is a potential annual savings of about $18,000 resulting from the automation of applicant tracking- and recruiting-related tasks, based on the average frequency and times reported. The largest component of this savings is about $3,600 annually from creating efficiencies in collecting and storing a candidate's information, resumes, etc. Figure 5 provides an overview of the average cost for each task, the average potential savings, and cost of labor per task.

Figure 5

Task	Applicant tracking and recruiting	Average cost *(current automation)*	Average cost *(maximum automation)*	Average annual savings	Average cost of labor per task *(current automation)*	Average cost of labor per task *(maximum automation)*	Average annual savings *(per task)*
1	Posting an open position	$3,964.92	$2,339.84	$1,625.08	$18.52	$10.93	$7.59
2	Scheduling a candidate interview	$6,216.23	$3,682.37	$2,533.86	$17.30	$10.25	$7.05
3	Collecting and storing a candidate's information, resumes, etc.	$8,229.50	$4,594.08	$3,635.42	$20.61	$11.51	$9.11
4	Collecting hiring approvals of a candidate	$4,260.54	$2,478.29	$1,782.25	$15.71	$9.14	$6.57
5	Extending a formal offer to a candidate	$5,495.59	$3,397.22	$2,098.36	$17.73	$10.96	$6.77
6	Creating a report of open positions across the organization	$5,110.04	$2,889.15	$2,220.89	$18.52	$10.47	$8.05
7	Identifying employees for whom a stay interview should be conducted	$3,984.47	$2,427.15	$1,557.32	$16.21	$9.88	$6.34
8	Conducting a stay interview with an employee	$7,888.38	$5,101.65	$2,786.73	$25.93	$16.77	$9.16
	Total			**$18,239.91**			

Key differences across industries

Some differences across industries are worth noting: The **finance and insurance** industries reported higher costs per task than the aggregate, driven by certain tasks being completed more times per week, such as scheduling a candidate interview and extending a formal offer to a client and a higher average time generally spent on each task.

The **educational services** industry has lower costs than the aggregate, driven by certain tasks being completed fewer times per week, such as scheduling a candidate interview and extending a formal offer, generally lower cost of labor per task, and a slightly lower average time spent on each task.

Additional survey insights

Survey data also indicates that it takes an average of 91 days to fill a typical role and an average of 78 days to fill a critical role. The average turnover at 90 days is 14%. The data also indicates an average cost of about $4,100 to promote or transfer an internal hire to fill a vacancy, with only slightly lower average costs of about $4,200 to hire an external employee to fill the same vacancy. An automated and integrated HCMS would be beneficial for tracking and monitoring turnover and open positions. The survey responses

indicated that 77% of respondents believe that real-time data allowing for the analysis of retention and turnover would add significant value.

Onboarding new employees

The responsibility for onboarding new employees within the HR function typically includes all tasks associated with entering employee information into the HRIS system and running analytics and reporting on the onboarding progress. HR representatives often complete aspects of each task that are not automated, as new employees cannot complete most of these activities themselves. Figure 6 provides an overview of the current level and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have a 77% potential for automation on average, though most reported that, on average, these tasks are currently only 54% automated on average, meaning there is significant opportunity to drive efficiencies across each of these tasks. Of the tasks analyzed as a part of the research, the study found that entering employee W-4 and other tax form information in the HRIS system, entering employee contact information in the HRIS system, and entering employee direct deposit information in the HRIS system are the three areas most likely to be automated currently, with organizations seeming to have less technology-driven processes for both entering applicable employee professional certifications in the HRIS or other data repository and entering employee employment agreements in the HRIS.

Figure 6

Task	Onboarding new employees	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Entering employee, I-9 information in the HRIS system	57%	79%	4.49	13.73
2	Entering employee contact information in the HRIS system	60%	81%	4.60	15.03
3	Entering employee W-4 and other tax form information in the HRIS system	62%	81%	5.18	15.46
4	Entering employee direct deposit information in the HRIS system	61%	81%	4.84	14.04
5	Entering employee employment agreements in the HRIS	46%	71%	3.84	14.04
6	Entering applicable employee professional certifications in the HRIS or other data repository	40%	70%	3.53	13.75
7	Running analytics and reporting on onboarding progress	55%	78%	4.34	20.98
	Average	**54%**	**77%**	**4.40**	**15.29**

Survey data shows that on average, tasks required for onboarding new employees are completed approximately four times per week, and the average time per task requires approximately 15 minutes each; there is a potential annual savings of about $6,600 resulting from the automation of onboarding new employees, based on the average frequency and times reported. The largest component of this savings is about $1,400 annually from creating efficiencies in running analytics and reporting on onboarding progress. Figure 7 provides an overview of the average cost for each task, the average potential savings, and the cost of labor per task.

Figure 7

Task	Onboarding new employees	Average cost (current automation)	Average cost (maximum automation)	Average annual savings	Average cost of labor per task (current automation)	Average cost of labor per task (maximum automation)	Average annual savings (per task)
1	Entering employee, I-9 information in the HRIS system	$1,675.96	$835.51	$840.44	$7.18	$3.58	$3.60
2	Entering employee contact information in the HRIS system	$1,911.58	$923.00	$988.58	$7.98	$3.86	$4.13
3	Entering employee W-4 and other tax form information in the HRIS system	$2,121.18	$1,025.97	$1,095.21	$7.88	$3.81	$4.07
4	Entering employee direct deposit information in the HRIS system	$1,804.12	$899.68	$904.44	$7.17	$3.58	$3.59
5	Entering employee employment agreements in the HRIS	$1,541.44	$813.60	$727.84	$7.73	$4.08	$3.65
6	Entering applicable employee professional certifications in the HRIS or other data repository	$1,364.10	$677.28	$686.82	$7.43	$3.69	$3.74
7	Running analytics and reporting on onboarding progress	$2,760.96	$1,330.95	$1,430.00	$12.23	$5.90	$6.34
	Total			**$6,673.34**			

Key differences across industries

Some differences across industries are worth noting: The **information** industry reported higher costs per task than the aggregate, driven by certain tasks being completed more times per week, such as entering employee direct deposit information in the HRIS system and entering employee W-4 and other tax information in the HRIS system, generally higher average costs of labor per task, and generally higher average time spent on each task.

The **construction** industry has lower costs than the aggregate, driven by certain tasks being completed fewer times per week on average, such as entering employee contact information in the HRIS system.

Open enrollment and benefits administration

The open enrollment and benefits administration responsibilities within the HR function typically include all tasks associated with providing and communicating information about plan benefits and verifying and processing enrollment elections. HR representatives often complete aspects of each task that are not automated. Figure 8 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have a 77% potential for automation on average, though most reported that, on average, these tasks are currently only 54% automated, meaning there is significant opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that providing summary plan documents to an employee and providing an employee with the ability to compare benefit plan options are the two areas most likely to be automated currently, with organizations seeming to have less technology-driven processes for both communicating a benefit plan change to employees and communicating the open enrollment timeline and windows/key dates to employees.

Figure 8

Task	Open enrollment and benefits administration	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Providing summary plan documents to an employee	58%	80%	3.35	28.70
2	Communicating a benefit plan change to employees	51%	75%	3.84	49.37
3	Providing an employee with the ability to compare benefit plan options	57%	79%	5.42	28.96
4	Processing benefit plan changes for an employee	56%	78%	4.37	47.33
5	Obtaining dependent eligibility confirmation for an employee	53%	75%	4.43	26.73
6	Communicating open enrollment timeline and windows/key dates to employees	51%	75%	4.60	41.93
7	Processing a new hire/qualified life change enrollment (out of the open enrollment window)	53%	76%	4.27	30.36
	Average	**54%**	**77%**	**4.32**	**36.20**

Survey data shows that on average, tasks required for open enrollment and benefits administration are completed approximately four times per week, and the average time per task requires approximately 36 minutes each; there is a potential annual savings of about $16,800 resulting from the automation of open enrollment and benefits administration, based on the average frequency and times reported. The largest component of this savings is $3,100 annually from creating efficiencies communicating open enrollment timeline and windows/key dates to employees. Figure 9 provides an overview of the average cost for each task, the average potential savings, and the cost of labor per task.

Figure 9

Task	Open enrollment and benefits administration	Average cost *(current automation)*	Average cost *(maximum automation)*	Average annual savings	Average cost of labor per task *(current automation)*	Average cost of labor per task *(maximum automation)*	Average annual savings *(per task)*
1	Providing summary plan documents to an employee	$2,963.71	$1,409.95	$1,553.77	$17.01	$8.09	$8.92
2	Communicating a benefit plan change to employees	$6,102.31	$3,071.38	$3,030.93	$30.59	$15.40	$15.19
3	Providing an employee with the ability to compare benefit plan options	$4,819.65	$2,388.79	$2,430.86	$17.10	$8.48	$8.62
4	Processing benefit plan changes for an employee	$6,178.01	$3,107.99	$3,070.02	$27.22	$13.69	$13.52
5	Obtaining dependent eligibility confirmation for an employee	$3,574.06	$1,937.65	$1,636.42	$15.51	$8.41	$7.10
6	Communicating open enrollment timeline and windows/key dates to employees	$6,285.57	$3,169.87	$3,115.71	$26.30	$13.27	$13.04
7	Processing a new hire/qualified life change enrollment (out of the open enrollment window)	$3,937.69	$2,011.56	$1,926.13	$17.71	$9.05	$8.66
	Total			**$16,763.82**			

Key differences across industries

Some differences across industries are worth noting: The **manufacturing** industry reported higher costs per task than the aggregate, with a higher average time spent across all tasks, especially time spent on processing benefit plan changes.

Time management

The time management responsibilities within the HR function typically include all tasks associated with submitting and verifying the accuracy of a timecard, as well as submitting, monitoring, and approving PTO and FMLA requests. A supervisor or manager often completes aspects of each task that are not automated. Figure 10 provides a current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have an 80% potential for automation on average, though most reported that, on average, these tasks are currently only 65% automated, meaning there is significant opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that an employee entering their timecard and a supervisor collecting an employee timecard are the two areas most likely to be automated currently, with organizations seeming to have less technology-driven processes for both reaching out and receiving missing/incomplete timecard information and tracking FMLA or other leave times for an employee.

Figure 10

Task	Time management	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	An employee entering their timecard	74%	84%	15.33	26.04
2	A supervisor collecting an employee timecard	74%	85%	9.17	22.99
3	Ensuring accuracy of an employee timecard	63%	78%	12.90	33.87
4	Reaching out and receiving missing/incomplete timecard information	52%	72%	8.68	37.78
5	Submitting a PTO request	65%	81%	11.60	22.18
6	Calculating an employee's PTO balance	72%	84%	7.07	24.40
7	Approving or denying a PTO request, including communicating outcome to employee	64%	80%	8.89	18.71
8	Tracking FMLA or other leave times for an employee	57%	79%	4.34	32.11
	Average	**65%**	**80%**	**9.75**	**27.26**

Survey data shows that on average, tasks required for time management are completed approximately ten times per week, and the average time per task requires approximately 27 minutes each; there is a potential annual savings of about $24,000 resulting from the automation of time management processes, based on the average frequency and times reported. The largest component of this savings is about $5,000 annually from creating efficiencies in ensuring accuracy of timecard information. Figure 11 provides an overview of the average cost for each task, the average potential savings, and the cost of labor per task.

Figure 11

Task	Time management	Average cost (current automation)	Average cost (maximum automation)	Average annual savings	Average cost of labor per task (current automation)	Average cost of labor per task (maximum automation)	Average annual savings (per task)
1	An employee entering their timecard	$9,861.55	$5,864.37	$3,997.18	$12.37	$7.36	$5.02
2	A supervisor collecting an employee timecard	$5,375.23	$3,111.99	$2,263.24	$11.27	$6.53	$4.75
3	Ensuring accuracy of an employee timecard	$11,919.88	$7,017.84	$4,902.04	$17.77	$10.46	$7.31
4	Reaching out and receiving missing/incomplete timecard information	$8,190.65	$4,686.20	$3,504.45	$18.15	$10.39	$7.77
5	Submitting a PTO request	$6,379.19	$3,556.55	$2,822.63	$10.58	$5.90	$4.68
6	Calculating an employee's PTO balance	$4,767.64	$2,705.79	$2,061.85	$12.96	$7.36	$5.61
7	Approving or denying a PTO request, including communicating outcome to employee	$4,823.41	$2,695.44	$2,127.97	$10.43	$5.83	$4.60
8	Tracking FMLA or other leave times for an employee	$4,198.43	$2,063.16	$2,135.27	$18.62	$9.15	$9.47
	Total			**$23,814.64**			

Key differences across industries

Some differences across industries are worth noting: The **retail trade** industry reported higher costs per task than the aggregate, driven by certain tasks being completed more times per week, such as ensuring the accuracy of an employee timecard, reaching out and receiving missing/incomplete timecard information, and submitting a PTO request, as well as a higher average time generally spent across all tasks.

Additional survey insights

Survey participants reported that, on average, 42 hours in total are typically overstated on time reports by the workforce each week, resulting in an average overage in costs to the organization each week of almost $1,350. Most (73%) survey participants reported that a centralized system with consistent processes and controls in place to reduce "cheating" in time reporting would add significant value for their organization.

Expense management

The expense management responsibilities within the HR function typically include all tasks associated with submitting, reviewing, and approving expenses. A supervisor or manager often completes aspects of each task that are not automated. Figure 12 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have a 74% potential for automation on average, though most reported that, on average, these tasks are currently only 50% automated, meaning there is significant opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that submitting an expense for reimbursement is the area most likely to be automated currently, with organizations seeming to have less technology-driven processes for both reviewing supporting documentation for an expense report and communicating expense approval/denial to employees.

Figure 12

Task	Expense management	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Submitting an expense for reimbursement	54%	77%	7.03	24.16
2	Submitting receipts/substantiation for expense	51%	75%	11.77	26.26
3	Tracking and calculating a mileage reimbursement	51%	75%	7.87	28.94
4	Reviewing supporting documentation for an expense request	47%	70%	8.74	41.03
5	Communicating expense approval/denial to employees	49%	73%	9.20	32.61
6	If the expense is approved, submitting it to payroll for the next cycle	51%	75%	7.93	21.77
	Average	**50%**	**74%**	**8.76**	**29.13**

Survey data shows that on average, tasks required for expense management are completed approximately nine times per week and the average time per task requires approximately 29 minutes each; there is a potential annual savings of about $20,000 resulting from the automation of expense management processes, based on the average frequency and times reported. The largest component of this savings is about $4,700 annually from creating efficiencies in reviewing supporting documentation for an expense request. Figure 13 provides an overview of the average cost for each task, the average potential savings, and the cost of labor per task.

Figure 13

Task	Expense management	Average cost *(current automation)*	Average cost *(maximum automation)*	Average annual savings	Average cost of labor per task *(current automation)*	Average cost of labor per task *(maximum automation)*	Average annual savings *(per task)*
1	Submitting an expense for reimbursement	$4,331.35	$2,199.08	$2,132.27	$11.85	$6.02	$5.83
2	Submitting receipts/substantiation for expense	$7,736.86	$3,906.59	$3,830.27	$12.64	$6.38	$6.26
3	Tracking and calculating a mileage reimbursement	$5,775.97	$2,915.41	$2,860.56	$14.12	$7.13	$6.99
4	Reviewing supporting documentation for an expense request	$10,760.98	$6,060.27	$4,700.71	$23.67	$13.33	$10.34
5	Communicating expense approval/denial to employees	$9,149.80	$4,857.85	$4,291.95	$19.12	$10.15	$8.97
6	If expense is approved, submitting it to payroll for the next cycle	$5,079.48	$2,615.63	$2,463.85	$12.31	$6.34	$5.97
	Total			**$20,279.61**			

Learning management

The learning management responsibilities within the HR function typically include all tasks associated with creating, registering, and tracking employee training. HR representatives often complete aspects of each task that are not automated. Figure 14 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have a 75% potential for automation on average, though most reported that, on average, these tasks are currently only 50% automated, meaning there is significant opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that registering an employee for a virtual training session and tracking required training progress for an employee are the two areas most likely to be automated currently, with organizations seeming to have less technology-driven processes for tracking renewals for professional certifications/regulatory requirements for an employee.

Figure 14

Task	Learning management	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Registering an employee for an in-person training session	49%	74%	5.55	20.99

Task	Learning management	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
2	Registering an employee for a virtual training session	53%	76%	5.36	20.74
3	Tracking required training progress for an employee	51%	77%	7.24	31.04
4	Creating and sending training materials for an employee	49%	73%	8.52	38.75
5	Providing an employee with access to historical training records	50%	75%	6.70	23.29
6	Tracking renewals for professional certifications/regulatory requirements for an employee	48%	76%	7.13	25.23
	Average	**50%**	**75%**	**6.75**	**26.67**

Survey data shows that on average, tasks required for learning management are completed approximately seven times per week and the average time per task requires approximately 27 minutes each; there is a potential annual savings of about $16,000 resulting from the automation of learning management processes, based on the average frequency and times reported. The largest component of this savings is about $4,500 annually from creating efficiencies in creating and sending training materials. Figure 15 provides an overview of the average cost for each task, the average potential savings, and the cost of labor per task.

Figure 15

Task	Learning management	Average cost *(current automation)*	Average cost *(maximum automation)*	Average annual savings	Average cost of labor per task *(current automation)*	Average cost of labor per task *(maximum automation)*	Average annual savings *(per task)*
1	Registering an employee for an in-person training session	$3,351.03	$1,755.24	$1,595.79	$11.61	$6.08	$5.53
2	Registering an employee for a virtual training session	$3,141.66	$1,583.00	$1,558.67	$11.27	$5.68	$5.59
3	Tracking required training progress for an employee	$6,147.51	$2,909.83	$3,237.67	$16.33	$7.73	$8.60
4	Creating and sending training materials for an employee	$9,367.76	$4,874.94	$4,492.82	$21.16	$11.01	$10.15
5	Providing an employee with access to historical training records	$4,342.17	$2,161.81	$2,180.36	$12.47	$6.21	$6.26

Task	Learning management	Average cost (current automation)	Average cost (maximum automation)	Average annual savings	Average cost of labor per task (current automation)	Average cost of labor per task (maximum automation)	Average annual savings (per task)
6	Tracking renewals for professional certifications/regulatory requirements for an employee	$4,915.66	$2,235.51	$2,680.15	$13.27	$6.03	$7.23
	Total			**$15,745.45**			

Key differences across industries

Some differences across industries are worth noting: The **educational services** industry has significantly lower costs than the aggregate, driven by tasks generally being completed much more frequently per week.

Performance management

The performance management responsibilities within the HR function typically include all tasks associated with completing, processing, and storing performance review forms and providing employees with performance information, such as promotion and compensation information. A supervisor or manager often completes aspects of each task that are not automated. Figure 16 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have a 74% potential for automation on average, though most reported that, on average, these tasks are currently only 47% automated, meaning there is significant opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that completing performance review forms for a direct report and organizing and storing performance data for an employee throughout the performance review life cycle are the two areas most likely to be automated currently, with organizations seeming to have less technology-driven processes for both providing an employee with information related to promotion or separation of employment and processing changes and updating a record for performance management.

Figure 16

Task	Performance management	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Completing performance review forms for a direct report	50%	75%	6.81	52.82
2	Organizing and storing performance data for an employee throughout the performance review life cycle	50%	78%	6.27	32.02
3	Providing an employee with information related to promotion or separation of employment	41%	69%	5.55	28.66

Task	Performance management	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
4	Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.)	48%	74%	5.73	27.75
5	Processing changes and updating a record for performance management (PIP, write-ups)	43%	71%	5.64	34.60
6	Running analytics and creating a report for the performance management process	49%	76%	6.08	39.83
	Average	**47%**	**74%**	**6.01**	**35.95**

Survey data shows that on average, tasks required for performance management are completed approximately six times per week and the average time per task requires approximately 36 minutes each; there is a potential annual savings of about $21,000 resulting from the automation of performance management processes, based on the average frequency and times reported. The largest component of this savings is approximately $5,800 annually from creating efficiencies in completing performance review forms for a direct report. Figure 17 provides an overview of the average cost for each task, the average potential savings, and the cost of labor per task.

Figure 17

Task	Performance management	Average cost (current automation)	Average cost (maximum automation)	Average annual savings	Average cost of labor per task (current automation)	Average cost of labor per task (maximum automation)	Average annual savings (per task)
1	Completing performance review forms for a direct report	$11,626.80	$5,783.24	$5,843.56	$32.85	$16.34	$16.51
2	Organizing and storing performance data for an employee throughout the performance review life cycle	$5,897.16	$2,615.19	$3,281.97	$18.09	$8.02	$10.07
3	Providing an employee with information related to promotion or separation of employment	$4,958.90	$2,631.68	$2,327.22	$17.17	$9.11	$8.06
4	Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.)	$4,940.97	$2,433.81	$2,507.16	$16.59	$8.17	$8.42
5	Processing changes and updating a record for performance management (PIP, write-ups)	$6,138.08	$3,127.18	$3,010.90	$20.94	$10.67	$10.27
6	Running analytics and creating a report for the performance management process	$7,466.22	$3,461.31	$4,004.91	$23.63	$10.95	$12.67

Task	Performance management	Average cost (current automation)	Average cost (maximum automation)	Average annual savings	Average cost of labor per task (current automation)	Average cost of labor per task (maximum automation)	Average annual savings (per task)
	Total			**$20,975.72**			

Key differences across industries

Some differences across industries are worth noting: The **educational services** industry has significantly higher costs than the aggregate, driven by more time being spent generally across all tasks, and tasks generally being completed more frequently per week.

Payroll and tax

The payroll and tax responsibilities within the HR function typically include all tasks associated with processing and updating payroll, such as answering employee questions, calculating taxes and other payments, and creating reports. HR representatives often complete aspects of each task that are not automated. Figure 18 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have an 80% potential for automation on average, though most reported that, on average, these tasks are currently already about 70% automated, meaning there is some opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that determining and calculating federal and state income and social security taxes and determining and calculating the employer's social security, unemployment, and workers' compensation payments are the two areas most likely to be automated currently, with organizations seeming to have significantly less technology-driven processes for responding to an employee's question.

Figure 18

Task	Payroll and tax	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Processing payroll	72%	83%	3.46	126.04
2	Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)	62%	76%	4.76	32.01
3	Determining and calculating federal and state income and social security taxes	81%	87%	13.17	29.86
4	Determining and calculating the employer's social security, unemployment, and workers' compensation payments	79%	86%	8.11	30.63
5	Responding to an employee's question or request regarding payroll	46%	63%	6.22	34.79
6	Determining and calculating tax credits authorized through a legislative change	73%	82%	6.47	37.54

Task	Payroll and tax	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
7	Ensuring compliance when a regulation changes	69%	80%	5.52	50.05
8	Creating a payroll report	74%	83%	6.57	30.58
9	Creating a headcount report	74%	82%	6.25	25.19
10	Creating a labor distribution report	73%	83%	6.00	31.95
	Average	**70%**	**80%**	**6.65**	**42.87**

Survey data shows that on average, tasks required for payroll and tax are completed approximately seven times per week and the average time per task requires approximately 43 minutes each; there is a potential annual savings of approximately $24,500 resulting from the automation of payroll and tax processes, based on the average frequency and times reported. The largest component of this savings is approximately $5,000 annually from processing payroll. Figure 19 provides an overview of the average cost for each task, the average potential savings, and the cost of labor per task.

Figure 19

Task	Payroll and tax	Average cost (current automation)	Average cost (maximum automation)	Average annual savings	Average cost of labor per task (current automation)	Average cost of labor per task (maximum automation)	Average annual savings (per task)
1	Processing payroll	$12,799.05	$7,766.46	$5,032.60	$71.23	$43.22	$28.01
2	Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)	$4,378.72	$2,773.90	$1,604.82	$17.70	$11.21	$6.49
3	Determining and calculating federal and state income and social security taxes	$9,667.48	$6,591.26	$3,076.23	$14.11	$9.62	$4.49
4	Determining and calculating the employer's social security, unemployment, and workers' compensation payments	$6,366.55	$4,281.59	$2,084.96	$15.09	$10.15	$4.94
5	Responding to an employee's question or request regarding payroll	$6,416.12	$4,407.05	$2,009.06	$19.83	$13.62	$6.21
6	Determining and calculating tax credits authorized through a legislative change	$7,240.65	$4,846.70	$2,393.95	$21.54	$14.42	$7.12
7	Ensuring compliance when a regulation changes	$8,056.43	$5,286.21	$2,770.22	$28.07	$18.42	$9.65

Task	Payroll and tax	Average cost (current automation)	Average cost (maximum automation)	Average annual savings	Average cost of labor per task (current automation)	Average cost of labor per task (maximum automation)	Average annual savings (per task)
8	Creating a payroll report	$5,656.46	$3,658.35	$1,998.11	$16.56	$10.71	$5.85
9	Creating a headcount report	$4,429.03	$2,935.10	$1,493.93	$13.62	$9.03	$4.59
10	Creating a labor distribution report	$5,502.60	$3,569.03	$1,933.56	$17.62	$11.43	$6.19
	Total			**$24,397.44**			

Additional survey insights

Survey responses indicate that an average of 22 full-time employees are responsible for processing payroll in an organization. The survey responses also indicate that there is an average of 30 pay-related disputes annually, with the cost of each being on average around $1,000. In addition, an average of 31 unwarranted overtime hours are reported each week, resulting in an average cost of about $1,000. Implementing an automated process could help minimize the disputes and overage of hours. Most (88%) survey respondents reported that a payroll system that embeds continuous improvement and constant system updates to remain compliant with changing regulations and legislation would add significant value for the organization.

Communications and engagement

The communications and engagement responsibilities within the HR function typically include all tasks associated with distributing communications and collecting feedback, including executing engagement surveys and sharing data from the surveys. HR representatives often complete aspects of each task that are not automated. Figure 20 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have a 77% potential for automation on average, though most reported that, on average, these tasks are currently only about 54% automated, meaning there is a significant opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that each task currently has a similar level of automation on average. Figure 17 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Figure 20

Task	Communications and engagement	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)	56%	78%	6.03	43.80
2	Collecting qualitative and/or quantitative feedback from employees	53%	77%	5.21	92.06

Task	Communications and engagement	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
3	Executing an engagement survey	55%	77%	8.34	52.79
4	Sharing and distributing data from an engagement survey (e.g., cascading manager reports)	52%	76%	6.38	44.79
	Average	**54%**	**77%**	**6.49**	**58.36**

Survey data shows that on average, tasks required for communications and engagement are completed approximately six times per week, and the average time per task requires approximately 58 minutes each; there is a potential annual savings of about $23,000 resulting from the automation of communications and engagement processes, based on the average frequency and times reported. The largest component of this savings is approximately $7,700 annually from creating efficiencies in collecting qualitative and/or quantitative feedback from employees. Figure 21 provides an overview of the average cost for each task, the average potential savings, and the cost of labor per task.

Figure 21

Task	Communications and engagement	Average cost *(current automation)*	Average cost *(maximum automation)*	Average annual savings	Average cost of labor per task *(current automation)*	Average cost of labor per task *(maximum automation)*	Average annual savings *(per task)*
1	Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)	$8,129.35	$4,148.15	$3,981.20	$25.95	$13.24	$12.71
2	Collecting qualitative and/or quantitative feedback from employees	$15,001.33	$7,252.59	$7,748.75	$55.39	$26.78	$28.61
3	Executing an engagement survey	$13,695.75	$6,971.49	$6,724.26	$31.58	$16.08	$15.51
4	Sharing and distributing data from an engagement survey (e.g., cascading manager reports)	$9,428.21	$4,775.09	$4,653.13	$28.41	$14.39	$14.02
	Total			**$23,107.33**			

Additional survey insights

Results also indicate that on average only about one-third of the workforce could be reached immediately with a time-sensitive, critical update, and, in order to reach the entire workforce with this update, it would take nearly 51 minutes on average. Most organizations are likely to communicate to their workforce through email, text messages, or video conference. A centralized system and processes that create a consistent workforce experience and drive increased employee engagement would drive significant value to the workforce, with 82% of respondents reporting they would find these things valuable.

Separation from the organization

The separation from the organization responsibilities within the HR function typically include all tasks associated with processing a termination, such as exit interviews, calculating and processing items due at termination, and filling the open spot. HR representatives often complete aspects of each task that are not automated. Figure 22 provides an overview of the current level of and potential for automation, the number of times per week a task is completed, and the average time to complete one task (in minutes).

Understanding potential automation and ROI

These responsibilities have a 71% potential for automation on average, though most reported that, on average, these tasks are currently only about 49% automated, meaning there is a significant opportunity to drive efficiencies in this area. Of the tasks analyzed as a part of the research, the study found that processing COBRA, retirement, and other benefit issues at separation and calculating final pay at employee termination are the two areas most likely to be automated currently, with organizations seeming to have less technology-driven processes for both creating and executing employee exit interview or survey and recording and tracking exit interview data.

Figure 22

Task	Separation from the organization	Average current level of automation	Average total potential for automation/ self-service	Average number of times completed (per week), current level of automation	Average time for one task (in minutes), current level of automation
1	Processing COBRA, retirement, and other benefit issues at separation	58%	77%	3.79	31.17
2	Recording and filing reason for employee separation	51%	72%	3.55	21.60
3	Creating and executing employee exit interview or survey	40%	68%	4.70	31.27
4	Recording and tracking exit interview data	40%	69%	4.38	23.92
5	Calculating final pay at employee termination	55%	74%	4.97	23.33
6	Terminating access to company systems/facilities	51%	71%	5.22	22.77
7	Promoting or transferring an employee into open spot	48%	68%	4.75	25.93
	Average	**49%**	**71%**	**4.48**	**25.71**

Survey data shows that on average, tasks required for separation from the organization are completed approximately four times per week and the average time per task requires approximately 26 minutes each; there is a potential annual savings of about $10,500 resulting from the automation of separation from the organization processes, based on the average frequency and times reported. The largest component of this savings is approximately $2,000 annually from creating efficiencies in executing an employee exit interview or survey. Figure 23 provides an overview of the average cost for each task, the average potential savings, and cost of labor per task.

Figure 23

Task	Separation from the organization	Average cost (current automation)	Average cost (maximum automation)	Average annual savings	Average cost of labor per task (current automation)	Average cost of labor per task (maximum automation)	Average annual savings (per task)
1	Processing COBRA, retirement, and other benefit issues at separation	$3,456.68	$1,891.70	$1,564.98	$17.53	$9.59	$7.94
2	Recording and filing reason for employee separation	$2,268.10	$1,298.33	$969.78	$12.28	$7.03	$5.25
3	Creating and executing employee exit interview or survey	$4,374.17	$2,321.97	$2,052.20	$17.91	$9.51	$8.40
4	Recording and tracking exit interview data	$3,097.21	$1,589.34	$1,507.87	$13.60	$6.98	$6.62
5	Calculating final pay at employee termination	$3,323.62	$1,913.29	$1,410.33	$12.86	$7.40	$5.46
6	Terminating access to company systems/facilities	$3,588.71	$2,082.51	$1,506.21	$13.22	$7.67	$5.55
7	Promoting or transferring an employee into open spot	$3,785.20	$2,329.18	$1,456.02	$15.31	$9.42	$5.89
	Total			**$10,467.39**			

Key differences across industries

Some differences across industries are worth noting: The **manufacturing** industry has slightly lower costs driven by tasks generally being performed slightly less frequently, as well as a slightly lower average time spent across all tasks, generally.

Additional survey questions

The survey also collected data from respondents around 12 additional questions to understand how technology can enable additional savings for the organization and drive value.

Application programming interface (API) integration was one of the areas identified for potential savings with on average 96 hours per week that can be saved with this type of integration, and nearly 80% of respondents indicating that an API integration capability results in significant value for the organization.

Mobile access for manager self-service was another area identified for potential savings. Respondents report that, on average, managers who are accessing a system to accomplish tasks like providing approvals, generating reports, and checking the status of a task for employees do so approximately 15 times per week. The data highlights that currently, not even one-third of those tasks have been optimized for mobile, yet managers save approximately 25 minutes per task for tasks that are able to be completed via mobile. Again, highlighting the positive impact integration and technology can have and demonstrating how mobile enablement could increase the manager experience and drive value by eliminating manager time spent on HR tasks.

The study also explored the frequency that HR fields requests from managers for status updates, approvals, etc. Survey respondents indicate that HR representatives field requests from managers an average of 15 times per week and report the potential for eliminating 80% of these requests, with a process that was fully automated for manager self-service.

While respondents reported that they would find significant value across all items asked in the questions below (Figure 24), the ability to have HR reporting that can be created in a single system would drive the most value across the organization. Survey participants say they would also find significant value with integration across API systems and mobile device access to organization data reports, and HR transactions.

Finally, the study asked about a few key opportunities for driving value across the enterprise through HCMS technology. Respondents indicated that HR reporting created and housed in a single system had the highest potential for value, with mobile device access to organization data, reports, and HR transactions as the second-highest value-driver.

Figure 24

Integration across API systems. — 78.10%
Mobile device access to team, reports, and HR transactions. — 77.29%
HR reporting that can be created in a single system. — 83.60%
Having greater insights into diversity data (e.g., pay equity, ratios of men: women in different business units, increased focus on… — 73.29%
The ability for managers to compare any data elements in the system (that they have access to) on their own. — 74.68%
The ability to compare performance data with customer satisfaction rates and other business data. — 74.91%

*The above questions were asked on a scale of 1 to 5, with 1 equal to "little to no value" and 5 equal to "significant value". The percentages above indicate those who choose a 4 or 5.

Building the case for change

Opportunities for driving value through technology and automation

Organizations do not take the cost of investing in an HCMS solution lightly. The business case must be compelling, and leaders must understand the ROI that the investment will bring. However, to build a convincing case, going beyond quantifiable value is important—it is not all about costs; it is also about value. If the business case is about winning the minds of leaders, the case for change is about winning the heart—as this is what helps to articulate the art of what's possible and envision what the future could hold if HR had the opportunity, and the space, to reimagine its role within an organization.

Take the applicant tracking and recruiting responsibilities as an example: if these tasks were to be fully automated and data-driven, the end result would inevitably be easier coordination and visibility across recruiters and hiring managers, resulting in better candidate choices. The enhanced data and tracking capabilities would also mean fewer vacancies in critical roles and a better view of the talent pool internally and externally, and ultimately less time spent searching. Instead, the HR workforce can spend their time understanding retention and turnover trends, identifying high-risk employees, comparing performance data with customer satisfaction rates and other business metrics, or analyzing diversity trends and strategically planning to address any identified issues.

For the time management and payroll tasks, the case for change may be even more clear—enhanced automation and controls in place mean less "cheating" in time reporting and more increased visibility into how the workforce is spending its time. It also means an increase in the headcount ratio in payroll, the improved ability to pay people correctly, and risk mitigation through an improved ability to comply with tax laws and avoid pay-related disputes. Instead, the HR workforce can spend their time optimizing performance across the enterprise using data and technologies to mobilize talent, drive business outcomes, and innovate for the future.

The strategic potential for HR

The strategic potential for HR is significant, but this does not mean that technology replaces the human aspect of work. Instead, the process is about the art of harmonizing both technology and humans; in fact, by augmenting human skills and capabilities with technologies, people are able to work more efficiently and productively with better, more comprehensive insights. By freeing up human time with technology and automation, the workforce is able to pivot its focus, investing that time in collaboration, innovation, and more strategic pursuits. This is already being executed at some of the most progressive companies, with high-performing organizations 5.4 times more likely to leverage new technologies to augment human skills and capabilities than are low-performing organizations. These organizations that leverage new technologies to augment human skills and capabilities are then 4.3 times more likely to anticipate change and respond effectively and 4.6 times more likely to engage the workforce.[13] By leveraging technology, including HCMS solutions, organizations are able to empower the HR function, creating the time and space needed for HR to assume the strategic leadership position of which it is capable.

An eye toward the future

As the world continues to grapple with a global pandemic, technology—now, more than ever—is critical for strategic enablement. Leaders recognize that the volatility associated with the unprecedented current events result in significant opportunities for their organizations. In fact, more than 75% of CEOs agree with that statement.[14] COVID-19 is requiring organizations to transform more quickly and in new ways in order to not only survive but also to thrive in our current environment and beyond. As articulated by a recent publication from Deloitte's CIO program, it is expected that "the companies that emerge stronger from the crisis are those that innovate through it, using the current crisis as an opportunity to digitally transform their company."[15]

One primary shift that has occurred as a result of the pandemic is, of course, the transition to a primarily or fully remote workforce, and, as a result, organizations have had to build effective infrastructure to support business continuity. This change necessitates continued investment in IT infrastructure/platforms; nearly one-half of CEOs surveyed by Deloitte and *Fortune* recently see this as their top investment priority post-pandemic, and more than 75% agree that their digital transformation efforts have been accelerated by the crisis.[16]

These global trends necessitate a change to how organizations operate, including evolution of onboarding practices, increased emphasis on reskilling/upskilling the workforce, reinvented hiring practices, the enabling of remote work, and more complex talent management—all of which have to be enabled by next-level HR data and a foundation of modern HR technology.

While the future of HR is bright, the mandate for leaders is clear: a significant case could be made for considering the ROI of an HCMS solution, as well as its resulting strategic enablement. However, in order to achieve the exponential value HR is capable of, the function must operate on a strong, evolving foundation of modern technology and digital practices.

Appendix I—Methodology

Note: all numbers below have been rounded for purposes of this paper

Cost of labor per task

To determine the cost of labor for each task, we looked at two components: the cost required to complete the task and the cost required to correct any errors.

To determine the cost required to complete the task, we first determined the amount of the percentage of the task that is currently done manually and the percentage of the potential manual effort. For example, the posting of an open position task in the Applicant Tracking and Recruiting function is currently 59% automated today, on average. The current level of manual work is determined by one minus the current level of automation today, or 1-.59=.41. To calculate the percentage of the potential manual effort required, we took one minus the potential for automation, or 1-.76=.24.

Next, we calculated the average time to complete the task in minutes, assuming no automation today. To do this, we summed the average time of minutes it takes to complete the task, 30.60 minutes, and the average time spent on correcting errors, 18.97 minutes * the 8.48% of tasks that require correction weekly, and divided by the current level of manual effort today, .41, resulting in 77.97 minutes. Next, we calculated the average time to complete the task in minutes at the current level of automation. To do this, we multiplied the average time to complete the task in minutes, assuming no automation today, 77.97 minutes multiplied by the current level of manual effort today, .41, resulting in 32.21 minutes.

Next, we calculated the average time to complete the task in minutes, assuming max automation (future). To do this, we multiplied the average time to complete the task in minutes, assuming no automation today, 32.21 minutes times the percentage of the potential manual effort required, .24, resulting in 19.01 minutes.

To get the cost of labor per task (current automation), we took the total labor cost per minute, $35 per hour/60 minutes per hour, resulting in $0.58 per minute multiplied by the average time to complete the task in minutes at the current level of automation, 32.21 minutes. This results in an average cost of labor per task (current automation) of $18.52.

To get the cost of labor per task (max automation), we took the total labor cost per minute, $35 per hour/60 minutes per hour, resulting in $0.58 per minute multiplied by the average time to complete the task in minutes, assuming max automation, 19.01 minutes. This results in an average cost of labor per task (max automation) of $10.93.

Annual cost of executing the task (current level of automation)

The annual cost of executing a task that is currently automated today is determined by multiplying the total average labor cost per week by 52 weeks in a year by the average number of times the task is completed. In the example of posting an open position, the average annual cost of executing the task (current level of automation) is $18.52 * 52 * 4.12, or $3,964.92.

Annual cost of executing the task (max automation)

The annual cost of executing a task at max automated is determined by multiplying the total average labor cost per week by 52 weeks in a year by the average number of times the task is completed. In the example of posting an open position, the average annual cost of executing the task (current level of automation) is $10.93 * 52 * 4.12, or $2,339.84.

Potential annual savings

Potential annual savings (max automation – today's automation) from this task is determined as the difference between the annual cost of executing a task (current level of automation) and the annual cost of executing a task (max automation). The potential annual savings in the posting an open position example is $3,964.92- $2,339.84, $1,625.08

Appendix II—References

1. *The High-Impact HR Operating Model: Familiar. Sustainable. Revolutionary*, Deloitte Consulting LLP, Art Mazor, Kraig Eaton, Filip Gilbert, Erica Volini, Michael Stephan, Mark Maclean, Gary Johnson, Roberta Yoshida, Michael Gretczko, Richard Coombes, 2017.

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16. *Fortune and Deloitte CEO survey*, Deloitte Consulting, LLC, Lambert, 2020.

Appendix III—Questionnaire

Welcome to the ROI of HCM Solutions Study!

Thank you for your participation! The purpose of this survey is help understand the level of effort and costs associated with key HR scenarios and activities (e.g., onboarding new employees, benefits enrollment, payroll, etc.).

In addition, we are looking to gain insights into areas outside of the pure transactional activities such as understanding how an HCM solution may aid in unlocking the full potential of your workforce.

The goal of the study is to determine the ROI of HCM solutions by quantifying the effort required and the value of labor to execute some of the most common HR processes and to support and build a business case for potential customers that have not yet implemented HCM solutions.

Please be assured of the confidentiality of your responses. Your answers will be collected by an independent third party (Deloitte Consulting LLP). The survey will close on Friday, October 30 at 11:59 p.m. CST.

If you experience any technical difficulties with this survey, please contact USworkforceinsightsSurveyHelp@Deloitte.com.

- I have read the above and agree to complete the survey

- I want to exit the survey

Survey Instructions

Please complete the entire survey in one sitting and answer the questions openly and honestly. Each answer provides important information for later questions.

As you complete the survey, please keep the following in mind:

- Your answers are saved only if you click the right arrow on the bottom of each page. You may change your answer any time prior to submission of the survey.

- If you are taking this survey on a smart phone, please turn the screen horizontally for the best view.

If you experience any technical difficulties with this survey, please contact: USworkforceinsightsSurveyHelp@Deloitte.com.

Survey Demographic Questions

Please indicate where your organization is headquartered:

- United States
- Canada
- United Kingdom
- Australia
- New Zealand
- None of the above

Which of the following best describes your department or current functional role at work?

- Accounting/Finance
- Design/Engineering
- Executive Management/Senior Leadership
- Human Resources
- Information Technology
- Infrastructure (Non-IT)
- Legal Professional
- Manufacturing
- Marketing/Advertising
- Procurement/Purchasing
- Sales/Business Development
- Supply Chain/Demand Management
- Warehouse/Transportation/Shipping
- Other

Which of the following best describes your business title?

- C-Level Executive
- EVP/SVP
- VP
- Director
- Manager
- Supervisor
- Individual Contributor
- Other (please specify)

How many total employees work for your organization?

- Less than 50
- 50-249
- 250-499
- 500-999
- 1,000-2,499
- 2,500-4,999
- 5,000-9,999
- 10,000-19,999
- 20,000-29,999
- 30,000 or more

Please enter your organization's 2-digit NAICS code: _____

If you do not know your organization's NAICS code, you can find an overview here: NAICS code

Please indicate which option below best describes the industry you work in:

- Agriculture, Forestry, Fishing, and Hunting
- Mining
- Utilities
- Construction
- Manufacturing

- Wholesale Trade
- Retail Trade
- Transportation and Warehousing
- Information
- Finance and Insurance
- Real Estate Rental and Leasing
- Professional, Scientific, and Technical Services
- Management of Companies and Enterprises
- Administrative and Support, Waste Management, and Remediation Services
- Educational Services
- Health Care and Social Assistance
- Arts, Entertainment, and Recreation
- Accommodation and Food Services
- Public Administration
- Other (please specify)

Which of the following estimates below best represents annual revenue for your business?

- Under $500,000
- $500,000 – $999,999
- $1,000,000 – $2,499,999
- $2,500,000 – $4,999,999
- 5,000,000 – 9,999,999
- 10,000,000 – 99,999,999
- $100,000,000+

Which of the following HCM software vendors is your organization currently utilizing (select all that apply)?

- Paylocity
- Workday
- SAP
- Oracle
- SAP SuccessFactors
- Ultimate
- Kronos
- Ceridian
- Cornerstone
- ADP
- Microsoft
- My organization does not use an HCM software
- Other (please specify)

How many different physical office locations does your organization have?

- 0 – we have no physical office locations
- 1 physical office location
- 2-4 physical office locations
- 5-9 physical office locations
- 10-20 physical office locations
- More than 20 physical office locations

In how many different states does your organization have physical office locations?

- 1 state
- 2 states
- 3-5 states
- 6-10 states
- 11-25 states
- 26-49 states
- All 50 states

Please indicate your level of comfort in your ability to respond to specific questions regarding how your organization carries out common HR tasks. You will be asked questions such as:

- Degree to which various tasks have been automated,
- Degree to which various tasks can be further automated,
- Indicating who holds primary responsibility for completing each of the various tasks,
- Estimating the time, it takes to complete the various tasks,
- Error rates associated with the various tasks, including % of task requiring correction and time spent correcting,
- Estimating the average hourly rate of an employee who completes the various tasks, etc.

	Not comfortable at all	Not very comfortable	Somewhat comfortable	Very comfortable	Extremely comfortable
Onboarding New Employees	o	o	o	o	o
Open Enrollment/Benefits Administration	o	o	o	o	o
Learning Management	o	o	o	o	o
Expense Management	o	o	o	o	o
Time Management	o	o	o	o	o
Performance Management	o	o	o	o	o
Separation from the Organization	o	o	o	o	o
Payroll and Tax	o	o	o	o	o
Communications and Engagement	o	o	o	o	o
Applicant Tracking and Recruiting	o	o	o	o	o

Onboarding New Employees

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/25% manual	50%/50%	25% automated/75% manual	100% manual
Entering employee, I-9 information in the HRIS system	o	o	o	o	o
Entering employee contact information in the HRIS system	o	o	o	o	o
Entering employee W-4 and other tax form information in the HRIS system	o	o	o	o	o
Entering employee direct deposit information in the HRIS system	o	o	o	o	o
Entering employee employment agreements in the HRIS	o	o	o	o	o
Entering applicable employee professional certifications in the HRIS or other data repository	o	o	o	o	o
Running analytics and reporting on onboarding progress	o	o	o	o	o

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Entering employee, I-9 information in the HRIS system   _____

Entering employee contact information in the HRIS system   _____

Entering employee W-4 and other tax form information in the HRIS system   _____

Entering employee direct deposit information in the HRIS system   _____

Entering employee employment agreements in the HRIS   _____

Entering applicable employee professional certifications in the HRIS or other data repository   _____

Running analytics and reporting on onboarding progress   _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/manager	An HR representative	Other
Entering employee, I-9 information in the HRIS system	o	o	o	o	o
Entering employee contact information in the HRIS system	o	o	o	o	o
Entering employee W-4 and other tax form information in the HRIS system	o	o	o	o	o
Entering employee direct deposit information in the HRIS system	o	o	o	o	o
Entering employee employment agreements in the HRIS	o	o	o	o	o
Entering applicable employee professional certifications in the HRIS or other data repository	o	o	o	o	o
Running analytics and reporting on onboarding progress	o	o	o	o	o

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Entering employee, I-9 information in the HRIS system   _____

Entering employee contact information in the HRIS system   _____

Entering employee W-4 and other tax form information in the HRIS system   _____

Entering employee direct deposit information in the HRIS system   _____

Entering employee employment agreements in the HRIS   _____

Entering applicable employee professional certifications in the HRIS or other data repository   _____

Running analytics and reporting on onboarding progress   _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Entering employee, I-9 information in the HRIS system   _____

Entering employee contact information in the HRIS system   _____

Entering employee W-4 and other tax form information in the HRIS system   _____

Entering employee direct deposit information in the HRIS system   _____

Entering employee employment agreements in the HRIS   _____

Entering applicable employee professional certifications in the HRIS or other data repository   _____

Running analytics and reporting on onboarding progress   _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Entering employee, I-9 information in the HRIS system _____

Entering employee contact information in the HRIS system _____

Entering employee W-4 and other tax form information in the HRIS system _____

Entering employee direct deposit information in the HRIS system _____

Entering employee employment agreements in the HRIS _____

Entering applicable employee professional certifications in the HRIS or other data repository _____

Running analytics and reporting on onboarding progress _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Entering employee, I-9 information in the HRIS system	_____	_____
Entering employee contact information in the HRIS system	_____	_____
Entering employee W-4 and other tax form information in the HRIS system	_____	_____
Entering employee direct deposit information in the HRIS system	_____	_____
Entering employee employment agreements in the HRIS	_____	_____
Entering applicable employee professional certifications in the HRIS or other data repository	_____	_____
Running analytics and reporting on onboarding progress	_____	_____

Open Enrollment/Benefits Administration

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/25% manual	50%/50%	25% automated/75% manual	100% manual
Providing summary plan documents to an employee	o	o	o	o	o
Communicating a benefit plan change to employees	o	o	o	o	o
Providing an employee with the ability to compare benefit plan options	o	o	o	o	o
Processing benefit plan changes for an employee	o	o	o	o	o
Obtaining dependent eligibility confirmation for an employee	o	o	o	o	o
Communicating open enrollment timeline and windows/key dates to employees	o	o	o	o	o
Processing a new hire/qualified life change enrollment (out of the open enrollment window)	o	o	o	o	o

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Providing summary plan documents to an employee _____

Communicating a benefit plan change to employees _____

Providing an employee with the ability to compare benefit plan options _____

Processing benefit plan changes for an employee _____

Obtaining dependent eligibility confirmation for an employee _____

Communicating open enrollment timeline and windows/key dates to employees _____

Processing a new hire/qualified life change enrollment (out of the open enrollment window) _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
Providing summary plan documents to an employee	○	○	○	○	○
Communicating a benefit plan change to employees	○	○	○	○	○
Providing an employee with the ability to compare benefit plan options	○	○	○	○	○
Processing benefit plan changes for an employee	○	○	○	○	○
Obtaining dependent eligibility confirmation for an employee	○	○	○	○	○
Communicating open enrollment timeline and windows/key dates to employees	○	○	○	○	○
Processing a new hire/qualified life change enrollment (out of the open enrollment window)	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Providing summary plan documents to an employee _____

Communicating a benefit plan change to employees _____

Providing an employee with the ability to compare benefit plan options _____

Processing benefit plan changes for an employee _____

Obtaining dependent eligibility confirmation for an employee _____

Communicating open enrollment timeline and windows/key dates to employees _____

Processing a new hire/qualified life change enrollment (out of the open enrollment window) _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Providing summary plan documents to an employee _____

Communicating a benefit plan change to employees _____

Providing an employee with the ability to compare benefit plan options _____

Processing benefit plan changes for an employee _____

Obtaining dependent eligibility confirmation for an employee _____

Communicating open enrollment timeline and windows/key dates to employees _____

Processing a new hire/qualified life change enrollment (out of the open enrollment window) _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Providing summary plan documents to an employee   _____

Communicating a benefit plan change to employees   _____

Providing an employee with the ability to compare benefit plan options   _____

Processing benefit plan changes for an employee   _____

Obtaining dependent eligibility confirmation for an employee   _____

Communicating open enrollment timeline and windows/key dates to employees   _____

Processing a new hire/qualified life change enrollment (out of the open enrollment window)   _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Providing summary plan documents to an employee	_____	_____
Communicating a benefit plan change to employees	_____	_____
Providing an employee with the ability to compare benefit plan options	_____	_____
Processing benefit plan changes for an employee	_____	_____
Obtaining dependent eligibility confirmation for an employee	_____	_____
Communicating open enrollment timeline and windows/key dates to employees	_____	_____
Processing a new hire/qualified life change enrollment (out of the open enrollment window)	_____	_____

Learning Management

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/25% manual	50%/50%	25% automated/75% manual	100% manual
Registering an employee for an in-person training session	○	○	○	○	○
Registering an employee for a virtual training session	○	○	○	○	○
Tracking required training progress for an employee	○	○	○	○	○
Creating and sending training materials for an employee	○	○	○	○	○
Providing an employee with access to historical training records	○	○	○	○	○
Tracking renewals for professional certifications/regulatory requirements for an employee	○	○	○	○	○

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Registering an employee for an in-person training session   _____

Registering an employee for a virtual training session   _____

Tracking required training progress for an employee   _____

Creating and sending training materials for an employee   _____

Providing an employee with access to historical training records   _____

Tracking renewals for professional certifications/regulatory requirements for an employee   _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
Registering an employee for an in-person training session	○	○	○	○	○
Registering an employee for a virtual training session	○	○	○	○	○
Tracking required training progress for an employee	○	○	○	○	○
Creating and sending training materials for an employee	○	○	○	○	○
Providing an employee with access to historical training records	○	○	○	○	○
Tracking renewals for professional certifications/regulatory requirements for an employee	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Registering an employee for an in-person training session   _____

Registering an employee for a virtual training session   _____

Tracking required training progress for an employee   _____

Creating and sending training materials for an employee   _____

Providing an employee with access to historical training records   _____

Tracking renewals for professional certifications/regulatory requirements for an employee   _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Registering an employee for an in-person training session   _____

Registering an employee for a virtual training session   _____

Tracking required training progress for an employee   _____

Creating and sending training materials for an employee   _____

Providing an employee with access to historical training records   _____

Tracking renewals for professional certifications/regulatory requirements for an employee   _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Registering an employee for an in-person training session   _____

Registering an employee for a virtual training session   _____

Tracking required training progress for an employee   _____

Creating and sending training materials for an employee   _____

Providing an employee with access to historical training records   _____

Tracking renewals for professional certifications/regulatory requirements for an employee   _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Registering an employee for an in-person training session	_____	_____
Registering an employee for a virtual training session	_____	_____
Tracking required training progress for an employee	_____	_____
Creating and sending training materials for an employee	_____	_____
Providing an employee with access to historical training records	_____	_____
Tracking renewals for professional certifications/regulatory requirements for an employee	_____	_____

Expense Management

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/ 25% manual	50%/50%	25% automated/ 75% manual	100% manual
Submitting an expense for reimbursement	○	○	○	○	○
Submitting receipts/substantiation for expense	○	○	○	○	○
Tracking and calculating a mileage reimbursement	○	○	○	○	○
Reviewing supporting documentation for an expense request	○	○	○	○	○
Communicating expense approval/denial to employees	○	○	○	○	○
If expense is approved, submitting it to payroll for the next cycle	○	○	○	○	○

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Submitting an expense for reimbursement _____

Submitting receipts/substantiation for expense _____

Tracking and calculating a mileage reimbursement _____

Reviewing supporting documentation for an expense request _____

Communicating expense approval/denial to employees _____

If expense is approved, submitting it to payroll for the next cycle _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
Submitting an expense for reimbursement	○	○	○	○	○
Submitting receipts/substantiation for expense	○	○	○	○	○
Tracking and calculating a mileage reimbursement	○	○	○	○	○
Reviewing supporting documentation for an expense request	○	○	○	○	○
Communicating expense approval/denial to employees	○	○	○	○	○
If expense is approved, submitting it to payroll for the next cycle	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Submitting an expense for reimbursement _____

Submitting receipts/substantiation for expense _____

Tracking and calculating a mileage reimbursement _____

Reviewing supporting documentation for an expense request _____

Communicating expense approval/denial to employees _____

If expense is approved, submitting it to payroll for the next cycle _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Submitting an expense for reimbursement _____

Submitting receipts/substantiation for expense _____

Tracking and calculating a mileage reimbursement _____

Reviewing supporting documentation for an expense request _____

Communicating expense approval/denial to employees _____

If expense is approved, submitting it to payroll for the next cycle _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Submitting an expense for reimbursement   _____

Submitting receipts/substantiation for expense   _____

Tracking and calculating a mileage reimbursement   _____

Reviewing supporting documentation for an expense request   _____

Communicating expense approval/denial to employees   _____

If expense is approved, submitting it to payroll for the next cycle   _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Submitting an expense for reimbursement	_____	_____
Submitting receipts/substantiation for expense	_____	_____
Tracking and calculating a mileage reimbursement	_____	_____
Reviewing supporting documentation for an expense request	_____	_____
Communicating expense approval/denial to employees	_____	_____
If expense is approved, submitting it to payroll for the next cycle	_____	_____

Time Management

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/ 25% manual	50%/50%	25% automated/ 75% manual	100% manual
An employee entering their timecard	○	○	○	○	○
A supervisor collecting an employee timecard	○	○	○	○	○
Ensuring accuracy of an employee timecard	○	○	○	○	○
Reaching out and receiving missing/incomplete timecard information	○	○	○	○	○
Submitting a PTO request	○	○	○	○	○
Calculating an employee's PTO balance	○	○	○	○	○
Approving or denying a PTO request, including communicating outcome to employee	○	○	○	○	○
Tracking FMLA or other leave times for an employee	○	○	○	○	○

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

An employee entering their timecard _____

A supervisor collecting an employee timecard _____

Ensuring accuracy of an employee timecard _____

Reaching out and receiving missing/incomplete timecard information _____

Submitting a PTO request _____

Calculating an employee's PTO balance _____

Approving or denying a PTO request, including communicating outcome to employee _____

Tracking FMLA or other leave times for an employee _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
An employee entering their timecard	○	○	○	○	○
A supervisor collecting an employee timecard	○	○	○	○	○
Ensuring accuracy of an employee timecard	○	○	○	○	○
Reaching out and receiving missing/incomplete timecard information	○	○	○	○	○
Submitting a PTO request	○	○	○	○	○
Calculating an employee's PTO balance	○	○	○	○	○
Approving or denying a PTO request, including communicating outcome to employee	○	○	○	○	○
Tracking FMLA or other leave times for an employee	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

An employee entering their timecard   _____

A supervisor collecting an employee timecard   _____

Ensuring accuracy of an employee timecard   _____

Reaching out and receiving missing/incomplete timecard information   _____

Submitting a PTO request   _____

Calculating an employee's PTO balance   _____

Approving or denying a PTO request, including communicating outcome to employee   _____

Tracking FMLA or other leave times for an employee   _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

An employee entering their timecard _____

A supervisor collecting an employee timecard _____

Ensuring accuracy of an employee timecard _____

Reaching out and receiving missing/incomplete timecard information _____

Submitting a PTO request _____

Calculating an employee's PTO balance _____

Approving or denying a PTO request, including communicating outcome to employee _____

Tracking FMLA or other leave times for an employee _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

An employee entering their timecard _____

A supervisor collecting an employee timecard _____

Ensuring accuracy of an employee timecard _____

Reaching out and receiving missing/incomplete timecard information _____

Submitting a PTO request _____

Calculating an employee's PTO balance _____

Approving or denying a PTO request, including communicating outcome to employee _____

Tracking FMLA or other leave times for an employee _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
An employee entering their timecard	_____	_____
A supervisor collecting an employee timecard	_____	_____
Ensuring accuracy of an employee timecard	_____	_____
Reaching out and receiving missing/incomplete timecard information	_____	_____
Submitting a PTO request	_____	_____
Calculating an employee's PTO balance	_____	_____
Approving or denying a PTO request, including communicating outcome to employee	_____	_____
Tracking FMLA or other leave times for an employee	_____	_____

Please answer the question(s) below to your best knowledge. For the first 4 questions, if unknown, please leave blank:

Please estimate the total number of hours that are typically overstated in time reports by the workforce each week: _____

Based on your response to the above, please estimate what that overage amounts to in cost for the organization each week in wages paid: _____

Please estimate the number of contingent workers (e.g., freelancers, independent contractors, consultants, etc.) hired annually: _____

Please estimate the typical cost spent to hire/on board one contingent worker (e.g., freelancers, independent contractors, consultants, etc.): _____

For each of the following, please indicate the level of value each of the below would drive for your organization:

Accessing data through a centralized and automated system to track and reduce turnover.

	1	2	3	4	5	
Little to no value	○	○	○	○	○	Significant Value

A centralized system with consistent processes and controls in place in order to reduce "cheating" in time reporting.

	1	2	3	4	5	
Little to no value	○	○	○	○	○	Significant Value

A centralized system and processes that create a consistent workforce experience and drive increased employee engagement.

	1	2	3	4	5	
Little to no value						Significant Value
	○	○	○	○	○	

Performance Management

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/ 25% manual	50%/50%	25% automated/ 75% manual	100% manual
Completing performance review forms for a direct report	○	○	○	○	○
Organizing and storing performance data for an employee throughout the performance review life cycle	○	○	○	○	○
Providing an employee with information related to promotion or separation of employment	○	○	○	○	○
Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.)	○	○	○	○	○
Processing changes and updating a record for performance management (PIP, write-ups)	○	○	○	○	○
Running analytics and creating a report for the performance management process	○	○	○	○	○

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Completing performance review forms for a direct report _____

Organizing and storing performance data for an employee throughout the performance review life cycle _____

Providing an employee with information related to promotion or separation of employment _____

Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.) _____

Processing changes and updating a record for performance management (PIP, write-ups) _____

Running analytics and creating a report for the performance management process _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
Completing performance review forms for a direct report	○	○	○	○	○
Organizing and storing performance data for an employee throughout the performance review life cycle	○	○	○	○	○
Providing an employee with information related to promotion or separation of employment	○	○	○	○	○
Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.)	○	○	○	○	○
Processing changes and updating a record for performance management (PIP, write-ups)	○	○	○	○	○
Running analytics and creating a report for the performance management process	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Completing performance review forms for a direct report _____

Organizing and storing performance data for an employee throughout the performance review life cycle _____

Providing an employee with information related to promotion or separation of employment _____

Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.) _____

Processing changes and updating a record for performance management (PIP, write-ups) _____

Running analytics and creating a report for the performance management process _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Completing performance review forms for a direct report _____

Organizing and storing performance data for an employee throughout the performance review life cycle _____

Providing an employee with information related to promotion or separation of employment _____

Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.) _____

Processing changes and updating a record for performance management (PIP, write-ups) _____

Running analytics and creating a report for the performance management process _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Completing performance review forms for a direct report _____

Organizing and storing performance data for an employee throughout the performance review life cycle _____

Providing an employee with information related to promotion or separation of employment _____

Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.) _____

Processing changes and updating a record for performance management (PIP, write-ups) _____

Running analytics and creating a report for the performance management process _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Completing performance review forms for a direct report	_____	_____
Organizing and storing performance data for an employee throughout the performance review life cycle	_____	_____
Providing an employee with information related to promotion or separation of employment	_____	_____
Providing an employee with information pertaining to their compensation (base salary, bonuses, etc.)	_____	_____
Processing changes and updating a record for performance management (PIP, write-ups)	_____	_____
Running analytics and creating a report for the performance management process	_____	_____

Separation from the Organization

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/ 25% manual	50%/50%	25% automated/ 75% manual	100% manual
Processing COBRA, retirement, and other benefit issues at separation	○	○	○	○	○
Recording and filing reason for employee separation	○	○	○	○	○
Creating and executing employee exit interview or survey	○	○	○	○	○
Recording and tracking exit interview data	○	○	○	○	○
Calculating final pay at employee termination	○	○	○	○	○
Terminating access to company systems/facilities	○	○	○	○	○
Promoting or transferring an employee into open spot	○	○	○	○	○

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Processing COBRA, retirement, and other benefit issues at separation _____

Recording and filing reason for employee separation _____

Creating and executing employee exit interview or survey _____

Recording and tracking exit interview data _____

Calculating final pay at employee termination _____

Terminating access to company systems/facilities _____

Promoting or transferring an employee into open spot _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
Processing COBRA, retirement, and other benefit issues at separation	○	○	○	○	○
Recording and filing reason for employee separation	○	○	○	○	○
Creating and executing employee exit interview or survey	○	○	○	○	○
Recording and tracking exit interview data	○	○	○	○	○
Calculating final pay at employee termination	○	○	○	○	○
Terminating access to company systems/facilities	○	○	○	○	○
Promoting or transferring an employee into open spot	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Processing COBRA, retirement, and other benefit issues at separation _____

Recording and filing reason for employee separation _____

Creating and executing employee exit interview or survey _____

Recording and tracking exit interview data _____

Calculating final pay at employee termination _____

Terminating access to company systems/facilities _____

Promoting or transferring an employee into open spot _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Processing COBRA, retirement, and other benefit issues at separation   _____

Recording and filing reason for employee separation   _____

Creating and executing employee exit interview or survey   _____

Recording and tracking exit interview data   _____

Calculating final pay at employee termination   _____

Terminating access to company systems/facilities   _____

Promoting or transferring an employee into open spot   _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Processing COBRA, retirement, and other benefit issues at separation   _____

Recording and filing reason for employee separation   _____

Creating and executing employee exit interview or survey   _____

Recording and tracking exit interview data   _____

Calculating final pay at employee termination   _____

Terminating access to company systems/facilities   _____

Promoting or transferring an employee into open spot   _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Processing COBRA, retirement, and other benefit issues at separation	_____	_____
Recording and filing reason for employee separation	_____	_____
Creating and executing employee exit interview or survey	_____	_____
Recording and tracking exit interview data	_____	_____
Calculating final pay at employee termination	_____	_____
Terminating access to company systems/facilities	_____	_____
Promoting or transferring an employee into open spot	_____	_____

Payroll and Tax

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/ 25% manual	50%/50%	25% automated/ 75% manual	100% manual
Processing payroll	○	○	○	○	○
Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)	○	○	○	○	○
Determining and calculating federal and state income and social security taxes	○	○	○	○	○
Determining and calculating the employer's social security, unemployment, and workers' compensation payments	○	○	○	○	○
Responding to an employee's question or request regarding payroll	○	○	○	○	○
Determining and calculating tax credits authorized through a legislative change	○	○	○	○	○
Ensuring compliance when a regulation changes	○	○	○	○	○
Creating a payroll report	○	○	○	○	○
Creating a headcount report	○	○	○	○	○
Creating a labor distribution report	○	○	○	○	○

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Processing payroll _____

Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.) _____

Determining and calculating federal and state income and social security taxes _____

Determining and calculating the employer's social security, unemployment, and workers' compensation payments _____

Responding to an employee's question or request regarding payroll _____

Determining and calculating tax credits authorized through a legislative change _____

Ensuring compliance when a regulation changes _____

Creating a payroll report _____

Creating a headcount report _____

Creating a labor distribution report _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
Processing payroll	○	○	○	○	○
Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)	○	○	○	○	○
Determining and calculating federal and state income and social security taxes	○	○	○	○	○
Determining and calculating the employer's social security, unemployment, and workers' compensation payments	○	○	○	○	○
Responding to an employee's question or request regarding payroll	○	○	○	○	○
Determining and calculating tax credits authorized through a legislative change	○	○	○	○	○
Ensuring compliance when a regulation changes	○	○	○	○	○
Creating a payroll report	○	○	○	○	○
Creating a headcount report	○	○	○	○	○
Creating a labor distribution report	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Processing payroll   _____

Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)   _____

Determining and calculating federal and state income and social security taxes   _____

Determining and calculating the employer's social security, unemployment, and workers' compensation payments   _____

Responding to an employee's question or request regarding payroll   _____

Determining and calculating tax credits authorized through a legislative change   _____

Ensuring compliance when a regulation changes   _____

Creating a payroll report   _____

Creating a headcount report   _____

Creating a labor distribution report   _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Processing payroll   _____

Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)   _____

Determining and calculating federal and state income and social security taxes   _____

Determining and calculating the employer's social security, unemployment, and workers' compensation payments   _____

Responding to an employee's question or request regarding payroll   _____

Determining and calculating tax credits authorized through a legislative change   _____

Ensuring compliance when a regulation changes   _____

Creating a payroll report   _____

Creating a headcount report   _____

Creating a labor distribution report   _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Processing payroll   _____

Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)   _____

Determining and calculating federal and state income and social security taxes   _____

Determining and calculating the employer's social security, unemployment, and workers' compensation payments _____

Responding to an employee's question or request regarding payroll   _____

Determining and calculating tax credits authorized through a legislative change   _____

Ensuring compliance when a regulation changes   _____

Creating a payroll report   _____

Creating a headcount report   _____

Creating a labor distribution report   _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Processing payroll	_____	_____
Making an update to payroll records (e.g., exemptions, insurance coverage, job title, etc.)	_____	_____
Determining and calculating federal and state income and social security taxes	_____	_____
Determining and calculating the employer's social security, unemployment, and workers' compensation payments	_____	_____
Responding to an employee's question or request regarding payroll	_____	_____
Determining and calculating tax credits authorized through a legislative change	_____	_____
Ensuring compliance when a regulation changes	_____	_____
Creating a payroll report	_____	_____
Creating a headcount report	_____	_____
Creating a labor distribution report	_____	_____

Please answer the question(s) below to your best knowledge. For the first six questions, if unknown, please leave blank:

Please estimate the number of FTEs that are responsible for payroll processing in your organization: _____

Please estimate the number of pay related disputes annually: _____

Please estimate the average cost of a pay related dispute: _____

Please estimate the amount of excess wages annually paid out to employees who have been terminated or have left the organization: _____

Please estimate the number of unwarranted overtime hours reported each week: _____

Based on your response to the above question, please estimate what that means in wages paid weekly: _____

For the following question, please indicate the level of value the below would drive for your organization:

A payroll system that embeds continuous improvement and constant system updates to remain compliant with changing regulations/legislation

	1	2	3	4	5	
Little to no value	○	○	○	○	○	Significant Value

Communications and Engagement

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/25% manual	50%/50%	25% automated/75% manual	100% manual
Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)	○	○	○	○	○
Collecting qualitative and/or quantitative feedback from employees	○	○	○	○	○
Executing an engagement survey	○	○	○	○	○
Sharing and distributing data from an engagement survey (e.g., cascading manager reports)	○	○	○	○	○

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)   _____

Collecting qualitative and/or quantitative feedback from employees   _____

Executing an engagement survey   _____

Sharing and distributing data from an engagement survey (e.g., cascading manager reports)   _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)	○	○	○	○	○
Collecting qualitative and/or quantitative feedback from employees	○	○	○	○	○
Executing an engagement survey	○	○	○	○	○
Sharing and distributing data from an engagement survey (e.g., cascading manager reports)	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)   _____

Collecting qualitative and/or quantitative feedback from employees   _____

Executing an engagement survey   _____

Sharing and distributing data from an engagement survey (e.g., cascading manager reports)   _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)   _____

Collecting qualitative and/or quantitative feedback from employees   _____

Executing an engagement survey   _____

Sharing and distributing data from an engagement survey (e.g., cascading manager reports)   _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.) _____

Collecting qualitative and/or quantitative feedback from employees _____

Executing an engagement survey _____

Sharing and distributing data from an engagement survey (e.g., cascading manager reports) _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Distributing a communication to a designated group of employees (e.g., all employees, employees within a function, etc.)	_____	_____
Collecting qualitative and/or quantitative feedback from employees	_____	_____
Executing an engagement survey	_____	_____
Sharing and distributing data from an engagement survey (e.g., cascading manager reports)	_____	_____

Please estimate the percentage of your workforce you are able to reach immediately with a time-sensitive, critical update. If unknown, please leave blank: _____

Please estimate how long would it take you to reach your full workforce with a time-sensitive, critical update (in minutes). If unknown, please leave blank: _____

Please indicate the type of communications channels your organization uses (select all that apply):

- Email
- Text message
- Intranet posts
- Printed mailers
- Printed posters
- Newsletters
- Webinars
- Video conference
- Digital signage
- Other (please specify)
- None of the above

For the following question, please indicate the level of value the below would drive for your organization:

A centralized communication system that can reach the entire workforce, in minutes

	1	2	3	4	5	
Little to no value	○	○	○	○	○	Significant Value

Applicant Tracking and Recruiting

Please indicate the degree to which each of the following tasks have been automated in your organization.

Note that AUTOMATION refers to the aspects of a task that are system or self-service driven by software vs. the MANUAL aspects of a task that require human intervention outside of self-service to complete.

For this question, think about HOW the task is executed rather than how long it may take. For example, even if an employee spends 30 minutes filling out a self-service form, which simply requires inputting thoughts or data via their keyboard, but no other intervention is required (i.e., no manual intervention is required by HR), the execution and submission is 100% in the system, then this process could be considered 100% AUTOMATED.

	100% automated	75% automated/ 25% manual	50%/50%	25% automated/ 75% manual	100% manual
Posting an open position	○	○	○	○	○
Scheduling a candidate interview	○	○	○	○	○
Collecting and storing a candidate's information, resumes, etc.	○	○	○	○	○
Collecting hiring approvals of a candidate	○	○	○	○	○
Extending a formal offer to a candidate	○	○	○	○	○
Creating a report of open positions across the organization	○	○	○	○	○
Identifying employees where a stay interview should be conducted	○	○	○	○	○
Conducting a stay interview with an employee	○	○	○	○	○

In your opinion, what percentage of the task can be FURTHER automated? For example, if you answered that 25% of the task is currently automated, and you think an additional 25% can be automated for a total of 50%, please input "25".

Note, please exclude the "%" sign when inputting your answer, and if unknown, please leave blank:

Posting an open position _____

Scheduling a candidate interview _____

Collecting and storing a candidate's information, resumes, etc. _____

Collecting hiring approvals of a candidate _____

Extending a formal offer to a candidate _____

Creating a report of open positions across the organization _____

Identifying employees where a stay interview should be conducted _____

Conducting a stay interview with an employee _____

Who holds the primary responsibility for completing each of the tasks below?

	Employee	Executed fully by the system	A supervisor/ manager	An HR representative	Other
Posting an open position	○	○	○	○	○
Scheduling a candidate interview	○	○	○	○	○
Collecting and storing a candidate's information, resumes, etc.	○	○	○	○	○
Collecting hiring approvals of a candidate	○	○	○	○	○
Extending a formal offer to a candidate	○	○	○	○	○
Creating a report of open positions across the organization	○	○	○	○	○
Identifying employees where a stay interview should be conducted	○	○	○	○	○
Conducting a stay interview with an employee	○	○	○	○	○

On average, how much time is spent (by that individual who is primarily responsible) to execute the task to completion (in minutes)? If unknown, please leave blank:

Posting an open position _____

Scheduling a candidate interview _____

Collecting and storing a candidate's information, resumes, etc. _____

Collecting hiring approvals of a candidate _____

Extending a formal offer to a candidate _____

Creating a report of open positions across the organization _____

Identifying employees where a stay interview should be conducted _____

Conducting a stay interview with an employee _____

On average, how many times per week is this task completed across the organization? If unknown, please leave blank:

Note: You may use decimals to indicate tasks that occur less frequently. For example, if the task only happens 1 time, every two weeks, please input 0.50, or if the task only happens one time per month, please input 0.25.

Posting an open position _____

Scheduling a candidate interview _____

Collecting and storing a candidate's information, resumes, etc. _____

Collecting hiring approvals of a candidate _____

Extending a formal offer to a candidate _____

Creating a report of open positions across the organization _____

Identifying employees where a stay interview should be conducted _____

Conducting a stay interview with an employee _____

What is the average hourly rate (including benefits) for employees in your organization that are primarily responsible for carrying out these tasks? If unknown, please leave blank:

Posting an open position _____

Scheduling a candidate interview _____

Collecting and storing a candidate's information, resumes, etc. _____

Collecting hiring approvals of a candidate _____

Extending a formal offer to a candidate _____

Creating a report of open positions across the organization _____

Identifying employees where a stay interview should be conducted _____

Conducting a stay interview with an employee _____

Approximately what percentage of the tasks per week require corrections due to errors and/or omissions and how much time per correction is typically spent correcting each error (in minutes)? If unknown, please leave blank:

	Percentage of the tasks that require corrections	Time typically spent correcting these errors (in minutes)
Posting an open position	_____	_____
Scheduling a candidate interview	_____	_____
Collecting and storing a candidate's information, resumes, etc.	_____	_____
Collecting hiring approvals of a candidate	_____	_____
Extending a formal offer to a candidate	_____	_____
Creating a report of open positions across the organization	_____	_____
Identifying employees where a stay interview should be conducted	_____	_____
Conducting a stay interview with an employee	_____	_____

Please answer the question(s) below to your best knowledge. For the first six questions, if unknown, please leave blank.

Please estimate the average amount of time it takes for a typical role to be filled (in days): _____

Please estimate the average amount of time it takes for a critical role to be filled (in days): _____

Please estimate the number of critical roles currently vacant at your organization: _____

Please estimate the average turnover at 90 days at your organization: _____

Please estimate the typical cost to promote or transfer an internal hire to fill a vacancy at your organization: _____

Please estimate the typical cost to hire one external employee for that same job or vacancy: _____

For the following question, please indicate the level of value the below would drive for your organization:

Real-time data that allows for the analysis of retention and turnover trends

	1	2	3	4	5	
Little to no value						Significant Value
	○	○	○	○	○	

For each of the following, please indicate the level of value each of the below would drive for your organization:

The ability to compare performance data with customer satisfaction rates and other business data.

	1	2	3	4	5	
Little to no value						Significant Value
	○	○	○	○	○	

The ability for managers to compare any data elements in the system (that they have access to) on their own.

	1	2	3	4	5	
Little to no value						Significant Value
	○	○	○	○	○	

Having greater insights into diversity data (e.g., pay equity, ratios of men to women in different business units, increased focus on race/ethnicity, etc.).

	1	2	3	4	5	
Little to no value						Significant Value
	○	○	○	○	○	

HR reporting that can be created in a single system.

	1	2	3	4	5	
Little to no value						Significant Value
	○	○	○	○	○	

Mobile device access to team, reports, and HR transactions.

	1	2	3	4	5	
Little to no value						Significant Value
	○	○	○	○	○	

Integration across API systems.

	1	2	3	4	5	
Little to no value						Significant Value
	○	○	○	○	○	

Please answer the question(s) below to your best knowledge. For the first six questions, if unknown, please leave blank.

Please estimate the number of HR hours saved weekly with an API integration across systems: _____

Please indicate the number of times per week, HR fields requests from managers that are reaching out to initiate or follow up on the progress of various tasks: _____

Based on your above response, please estimate how many of those requests could be eliminated if additional automation/self-service capabilities were implemented: _____

Please estimate the typical number of times a manager accesses systems to provide approvals, reports, etc., per week: _____

Please estimate the percentage of those tasks that are currently able to be completed via mobile: _____

Please estimate the minutes per task a manager can save by accessing a workflow or system via mobile: _____

As your organization continues to automate transactional activities, it will enable HR to expand its strategic partnership with the business and create additional time for HR professionals to spend in new and innovative ways. As you think about the future, how do you see HR driving increased value for the business? _____

Please enter your email: _____

Please enter your company name: _____

Thank you for your participation. Please feel free to close your browser.

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