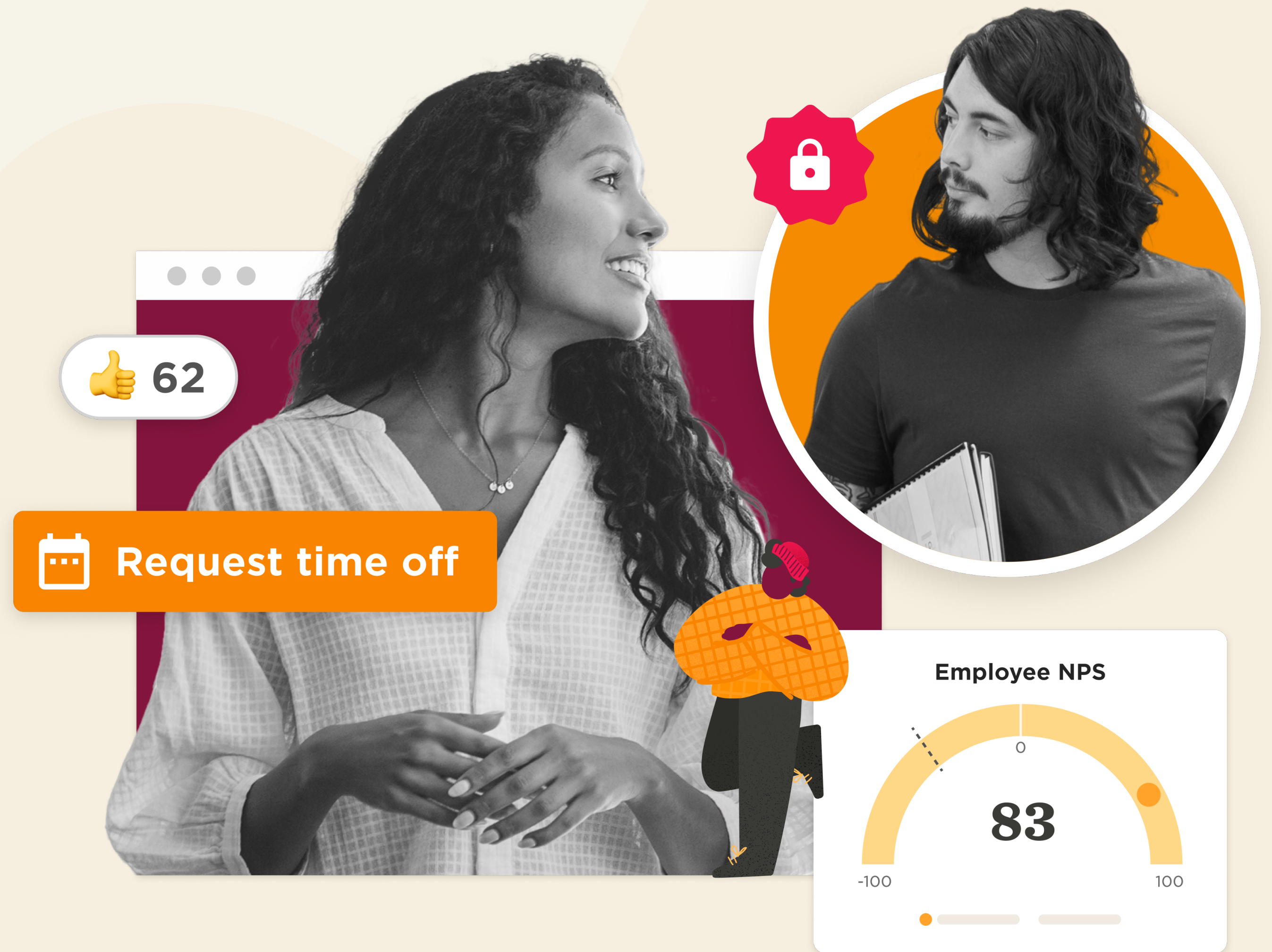


# The SMB guide to streamlining HR with Bob



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# Introduction

**SMBs drive innovation, yet many still struggle with outdated HR practices.**

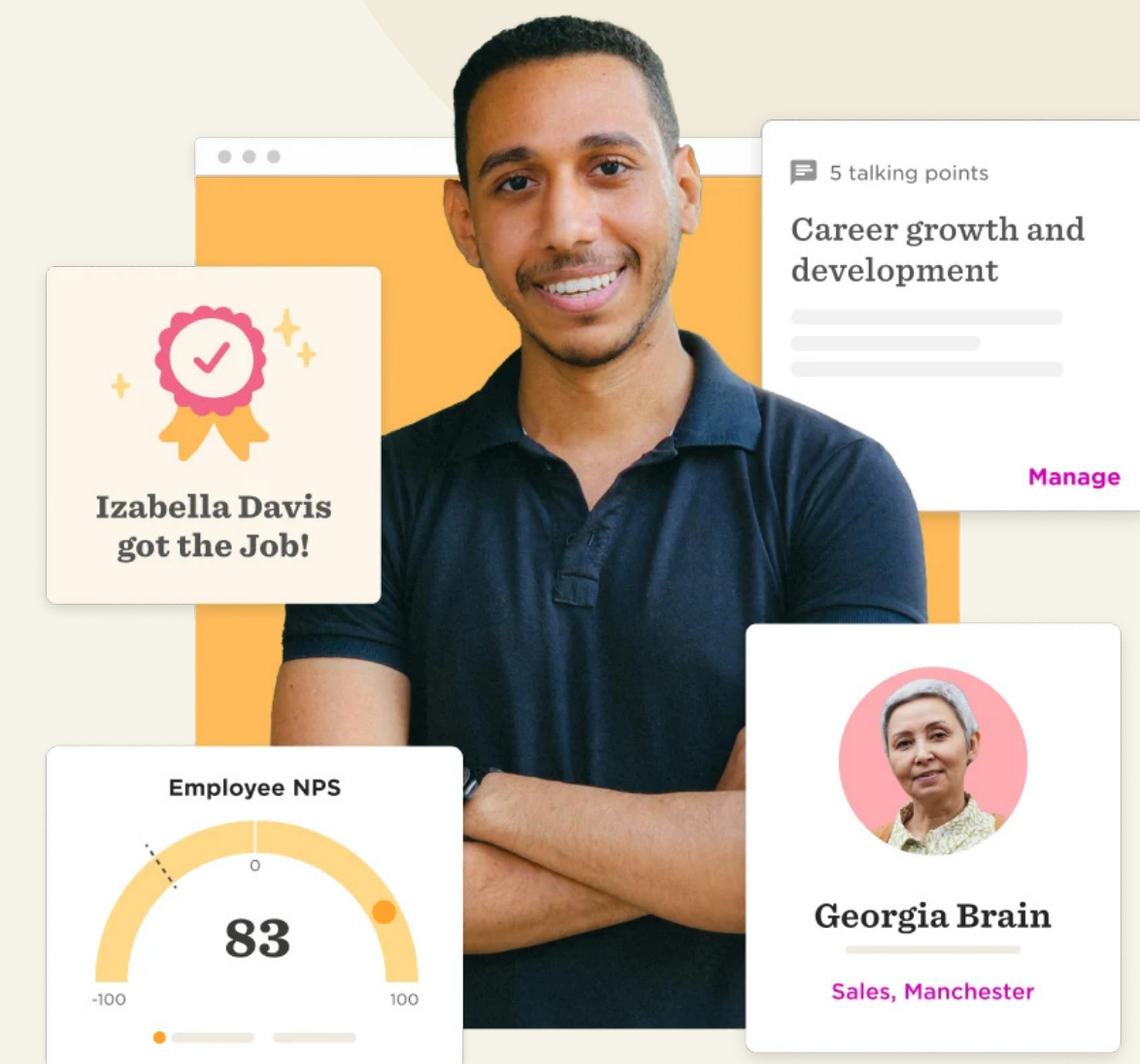
It's a familiar scene: teams buried in spreadsheets, swamped with emails, and struggling to keep up with changing compliance rules. Managing a global workforce across different time zones? That adds a whole new layer of complexity.

At the heart of these challenges is a common problem: relying on yesterday's tools to meet today's HR demands. SMBs need a solution that's as agile and adaptable as they are—and that's where Bob comes in.

Bob is a modern **HCM platform** built to transform **HR operations**, replacing outdated, fragmented processes with unified, scalable workflows that drive efficiency and unlock potential.

By centralizing tasks, automating repetitive work, and supporting seamless collaboration across borders, Bob shifts HR from an operational burden to a powerful asset.

Read on to discover how forward-thinking SMBs are using Bob to transform their HR and unlock new opportunities for growth—and how you can join them.



# Transforming HR processes with Bob

Automation is a hot topic in business today, and it holds exciting potential for HR.

With 38 percent of HR teams adopting automated tools—compared to 53 percent in IT services—there’s ample opportunity for forward-thinking businesses to take the lead.

So, what does **HR automation** for SMBs look like in practice? Let’s explore some real examples of how SMBs are streamlining their HR operations with Bob.



## 1. Automating time-consuming people management tasks

Most SMBs rely on just one or two people to handle all their HR needs. These small HR teams spend countless hours on manual tasks—tracking performance reviews, monitoring attendance, and updating team member records. The resulting administrative burden prevents them from focusing on what really matters: helping people and businesses grow.

By automating these repetitive tasks, even the smallest HR teams can operate like much larger departments.

Forward-thinking SMBs use Bob's automation to transform daily HR tasks:

- Creating dedicated, automated workflows for HR processes
- Setting up automated task assignments with clear timelines
- Triggering reminders and nudges to ensure task completion
- Syncing with communication tools like Slack and Google Calendar for seamless notification

Here's an example: **Xref**, a Sydney-based reference-checking company with 100 team members across five sites, demonstrates how automation transformed their operations.

Before Bob, their team used Excel and a different **HCM** to gather data, which was a time-consuming process that was prone to human error.



As their Global CFO/COO James Solomons explained:

**“We required a platform that could scale with us, integrate with our current software, and was customizable to our business needs. We needed to push more responsibility down to line managers but be able to see, from a helicopter view, how our biggest investment—our people—were being managed day to day.”**

With Bob, Xref's finance team can generate reports on hires, budgets, leave liability, and demographic information in moments. This keeps their admin processes agile, allowing teams to focus on growth rather than getting bogged down.

## 2. Streamlining time-off workflows and approvals

For many SMBs, time-off management starts with spreadsheets and email chains.

This might work with a small, local team, but what happens when your company expands across borders? Suddenly you're juggling different national holidays, varying local policies, and time zones—all while trying to maintain team coverage and fairness.

The challenges multiply quickly: How do you track leave balances across different regions? What happens when local holiday calendars clash? How do you ensure compliance with each country's vacation laws?

Without the right systems in place, these questions can overwhelm even the most organized HR teams.

This is where **Bob's automated features**, such as **Task Lists**, truly shine. Here's what they bring to the table:

1. Automated compliance tracking. Bob can automatically track **compliance** with local labor laws, such as mandatory breaks or maximum work hours per day, sending reminders when limits are approaching.
2. Location-specific time-off calendars. Bob supports the creation of location-specific time-off calendars, ensuring each team follows the appropriate holiday schedule for their region.
3. Customizable accrual policies. Bob allows for customizable accrual policies that automatically adjust based on factors like start date or local regulations, ensuring team members receive the correct amount of time off.

4. Automated approval workflows. **Time-off requests** are automatically routed to the appropriate manager for approval based on predefined workflows, streamlining the process.

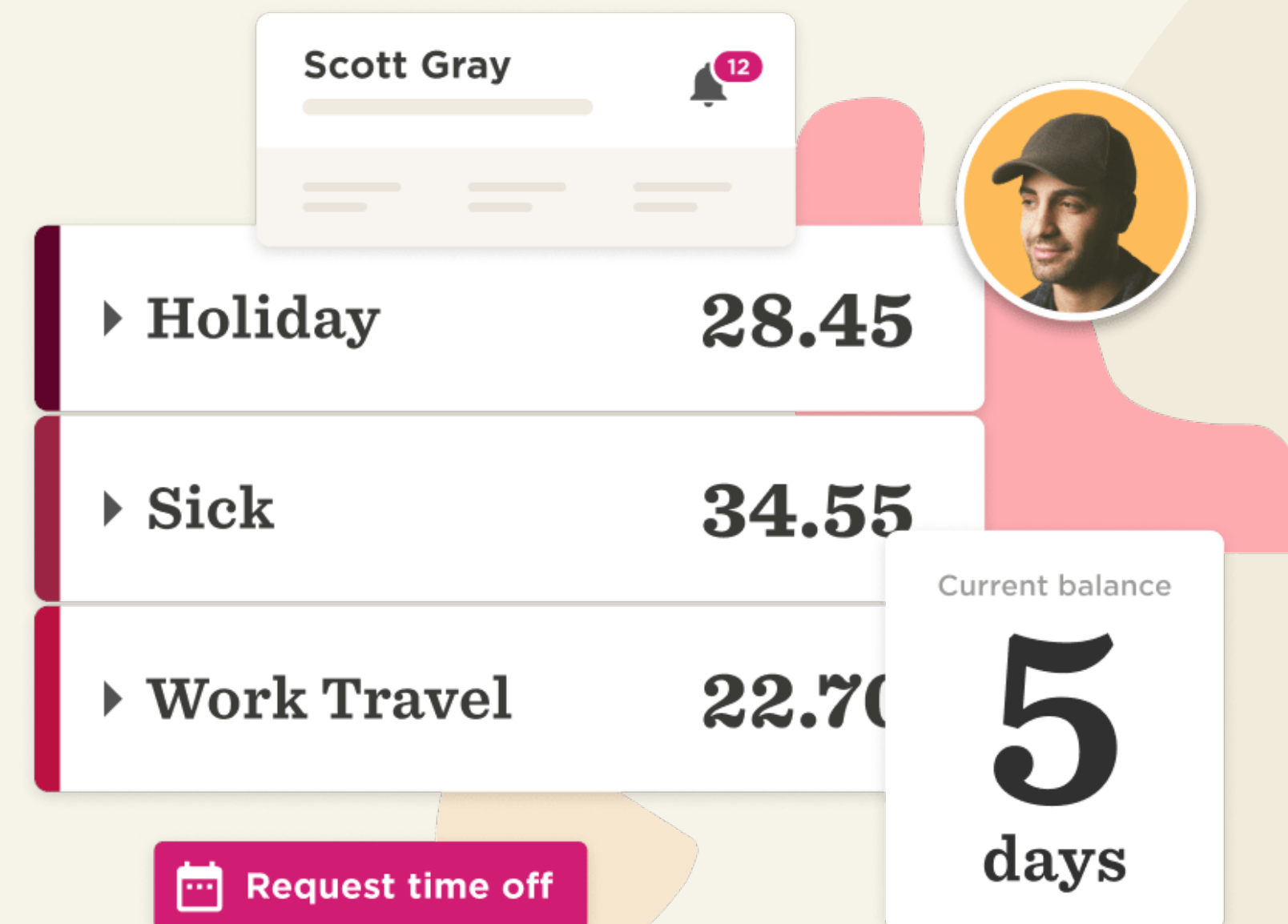
5. Real-time absence tracking. Bob provides a real-time view of who's in and who's out across the organization, helping managers ensure adequate coverage.

6. Integration with communication tools. Bob integrates with tools like Slack and MS Teams, allowing team members to seamlessly submit requests and receive approvals directly within these platforms.

HiBob's customers have created some incredible workflows using these features. Take **TourRadar**, an Austrian company of 170 team members, as an example.

Operating in Austria, there are strict labor laws requiring team members to take 30-minute breaks every six hours and limiting work to 12 hours daily. Using Bob's automation features, they set up automatic tracking and reminders to ensure compliance without constant manual oversight.

“It's both the time saved and the accuracy of results,” explains TourRadar People Director Alba Brasó. “We would be much more prone to error if we did this manually. I would need one more FTE in my team to do all the things that Bob does for us.”



ANYMOVE, a Berlin-based company with 45 team members, also shows how Bob can automate even the most complex time-off requirements, delivering compliance in the process. Their Berlin-based HR team uses Bob to automatically calculate vacation allowances based on start dates—a tricky requirement under German law, where allowances vary depending on when people join the company.

By automating and streamlining **HR processes**, including time-off management, Bob saves ANYMOVE's HR team an astonishing 13 hours of admin work each week!

It goes to show how the right automation tools can transform time-off management from a typical HR pain point into a streamlined process that ensures compliance, saves time, and provides a better experience for everyone involved.

**[Access your guide to mastering HR automation: From onboarding to promotions with Bob's Task Lists.](#)**





# Building global teams with Bob

**Global teams introduce unique HR challenges** for maintaining culture, compliance, and engagement across borders.

How do you maintain a cohesive company culture across multiple time zones? How do you ensure compliance with various local labor laws?

And how do you keep track of a dispersed workforce without getting lost in a maze of spreadsheets?

Forward-thinking SMBs are tackling these challenges head-on with the help of Bob. By harnessing Bob's streamlined HR processes and automation, they're forging cohesive global teams and cultivating an environment where every team member feels valued, engaged, and supported, no matter where they are working from.

## 1. Reimagining international onboarding

First impressions matter for SMBs—especially as they're often competing with bigger businesses to win over the best talent. That first impression starts with onboarding.

Remarkably, only **12 percent of survey respondents** feel their company's onboarding strategies are effective—alarming when you consider **79 percent of businesses** believe it's vital to integrate team members into company culture.

Take HiBob customer **Anyfin**, for example. With 150 team members across three countries, they needed a way to create a consistent onboarding experience at scale. Here's how they used Bob to make it happen:

- They set up recurring tasks for preboarding and onboarding to save the people team hours of work
- Anyfin uses Bob's onboarding workflows to automatically send a welcome email to new hires with a short video introducing the office space, showing where the coffee machine is, and letting them know they don't need to bring lunch on the first day
- Once new hires start, they provide access to more videos in Bob that introduce different people from across the company—including the founders—and present the company's mission

The result? A seamless, welcoming onboarding experience that makes new hires feel at home from day one while providing a structure that easily adapts as the company expands.



## 2. Accommodating global expansion

Rapid growth is an exciting milestone for SMBs, but it also brings a unique set of challenges, particularly when expanding across borders.

As SMBs add new hires to keep pace with demand, the administrative workload grows exponentially. Couple this with complying with new regulations, localizing **HR strategies**, and maintaining a strong organizational identity, and managing HR with a lean team can feel like an uphill battle.

This is where **HR tech** like Bob steps in. By automating compliance tracking, standardizing onboarding, and providing clear insights into workforce data, Bob empowers SMBs to confidently manage the demands of rapid growth and global expansion, transforming challenges into opportunities for sustainable success.

Take **Heroes**, a tech startup that began with just 15 people in London. As they expanded across three sites to become 79 team members strong and counting, their basic HRIS which didn't integrate with their other tools threatened to overwhelm their lean HR team.



Chloe Gibbs, HR Lead at Heroes, explains why they needed a change:

**“In May, we started looking for a new tool and were onboarded with HiBob by June. We evaluated many tools, and there are many reasons why we wanted to move to a different tool and why we chose HiBob. But ultimately, the main reason was the lack of integrations and streamlined processes, which would break us as a team because we’re so lean.”**

The impact was dramatic. Heroes now saves two working days per month through automated workflows and integrations. Their onboarding capacity increased fivefold—from managing two new hires per month to successfully onboarding 10.

Anyfin also recognized early that global expansion would require robust **HR systems**. Their Chief People Officer, Amanda Edwall, shares:

**“Finding an HRIS was one of the first things I did when I started working here. I looked at all the different systems and wanted to find one that could support us where we are now and where we’ll be in two, five, or 10 years.”**

They created automated workflows that ensure every new hire, regardless of location, goes through a consistent process, with tasks automatically assigned to the right people at the right time.

By implementing automated workflows and integrated systems early, these SMBs turned HR bottlenecks into growth enablers. Their lean teams can now maintain high standards and support international expansion without increasing HR headcount.

# Supporting rapid growth with Bob

When your company experiences a growth spurt, everything evolves.

A team of 10 transforms into 100, and a single office expands into global locations. What worked yesterday may no longer suffice today.

The goal isn't just to manage growth—it's to embrace it as an opportunity to build robust HR workflows that will support the company for years to come.

You know the score—here are some examples of how SMBs use Bob to stay ahead of the curve:

## 1. Maintaining company culture during growth phases

One of the key focuses for scaling companies is preserving the identity and values that make them unique.

A strong company culture is worth its weight in gold, with the potential to drive a **25 percent increase** in workforce growth over three years and an impressive 85 percent boost in net profit over five years.

Bob supports businesses in both preserving and strengthening their company culture and boosting engagement as they grow, even when teams are spread across multiple locations.



To build communities, Bob provides:

- A company news feed that displays announcements in a social media-style format, encouraging interaction and engagement
- Customizable profiles that go beyond basic information, allowing people to share pronouns, hobbies, and even pronunciation guides for their names
- Interest-based Clubs, a feature that automatically connects colleagues based on shared interests, locations, or departments
- Visual org charts that help teams understand not just reporting lines but also cross-functional relationships
- “**Your Voice**,” a dedicated module that acts as a safe space for team members to voice concerns anonymously

To drive engagement, Bob offers:

- Automated milestone celebrations that recognize birthdays, anniversaries, and achievements
- Recognition features like Shoutouts and Kudos which appear in the company feed and can be targeted to specific groups or the whole company
- Built-in pulse surveys with customizable questions to gather feedback on specific initiatives or general sentiment
- Integrated tools for virtual team building, including polls for company events and group activities

By creating a central **platform for engagement and collaboration**, Bob helps growing companies build cultures that scale, turning the challenge of expansion into an opportunity for greater connection and community.

## 2. Preparing for the future

For SMBs anticipating growth, choosing the right HR platform isn't just about solving today's challenges but preparing for what lies ahead.

While basic **HR technology for SMBs**, like spreadsheets and docs, might work for smaller teams, they risk becoming chaotic as HR functions scale.

Bob supports strategic growth through an array of scalable tools, such as:

- Task Lists that evolve from simple onboarding checklists to complex, multi-stakeholder workflows, adapting as teams and processes mature
- Performance management tools that grow from basic reviews into comprehensive talent development programs
- Analytics that advance from basic tracking to **strategic workforce planning** and insights
- Document management that streamlines HR processes, simplifying multi-regional policies and compliance



In fact, scalability is often one of the primary reasons businesses choose Bob in the first place, as Anyfin's Chief People Officer Amanda Edwall described:

**“Even if we didn't need the HR system at the moment, I bought it because I knew we would need it in one or two years. I wanted the organization to get used to it before we reach a point where it's already too late and would require a complex change management process instead. That was, I think, one of the biggest reasons for me to want to do it so early.”**

As per Anyfin's example, building scalable processes from the outset allows growing SMBs to stay ahead of HR challenges and avoid disruptive system overhauls during key growth phases.

# Creating a seamless HR ecosystem with Bob

Every growing business relies on multiple tools to manage its workforce—from communication platforms and **payroll systems** to recruitment software and document management. But without proper integration, these tools can create data silos, duplicate work, and increase the risk of errors.

Bob sits at the center of your HR tech stack, connecting seamlessly with the tools your team uses every day. It's not just about the quantity of integrations, though. It's about creating deep, meaningful connections that eliminate double data entry and automate workflows across systems.

Let's dive into how forward-thinking SMBs are using Bob to **create HR tech stacks** that punch well above their weight.





## 1. Streamlining HR and payroll

Manual data entry causes 40 percent of payroll mistakes, all of which can have consequences.

This highlights an opportunity for progressive businesses to transform their HR and payroll processes, which Heroes demonstrates perfectly.

Recognizing the advantages of creating a seamless, tightly integrated system, Heroes took the bold step to unify their HR and payroll with Bob. As their HR Lead Chloe Gibbs explains:

**“We needed an HCM platform that integrated with our payroll, recruiting system, and NetSuite. Something that connected seamlessly with all of our tools and was also flexible. Our previous HCM wasn’t flexible—we couldn’t add in our own fields, which is super important for a young company where your organizational structure will change over time.”**

Bob’s integration with their payroll platform, Payfit, proved to have some of the greatest impacts. The systems now sync effortlessly, removing the need for manual data entry and the risk of double data entry and other pesky errors.

Chloe highlights just how transformative this integration has been:

**“The integration between HiBob and Payfit has been a game changer for us. Previously, we entered team member data in both Personio and our payroll system. It was causing major issues and inconsistencies. So having Bob and Payfit talk to each other has been groundbreaking.”**

For a lean, fast-growing company like Heroes, this proved critical for scaling effectively and ensuring HR drives growth instead of holding it back.

## 2. Saving admin time

Integrations, when executed effectively, give SMBs the ability to act faster, make smarter decisions, and ensure their data aligns across systems.

Xref transformed their workflows by linking Bob with other key tools in their stack, such as Xero for payroll, SmartRecruiters for recruitment, and DocuSign for contract management.

This resulted in some impressive time-saving. Before using Bob, Xref's finance team spent hours manually inputting payroll and leave data—a process prone to errors and delays. Now, they save 2-3 hours each month, which is roughly the equivalent of an entire work week added up over a year.

Meanwhile, Xref has also integrated Bob with SmartRecruiters and DocuSign to streamline everything from job postings to contract management. Now Xref will only consider purchasing a new HR tech tool if it integrates with Bob!

The result, as we've come to see, is about cutting admin and automating tasks—transforming how **HR functions** from the ground up.



# Time to transform your HR operations

Throughout this guide, we've explored how SMBs are overcoming their greatest HR challenges using **SMB HR software solutions** like Bob.

From automating manual tasks to managing global teams and supporting rapid growth, these businesses are rethinking their HR processes with Bob.

For small businesses tackling complex HR demands, Bob offers the tools to simplify and scale operations. Whether you're dealing with manual workflows, managing a distributed workforce, or planning for future expansion, **Bob for small businesses** provides the flexibility and customization needed to adapt as you grow.

Beyond day-to-day efficiencies, these examples show many ways to improve HR efficiency with cutting-edge HR tools, making SMBs more agile and better equipped for the modern world of work.

With a range of integrations and powerful features, the Bob HR platform supports a future-ready approach to HR, laying the groundwork for long-term success.



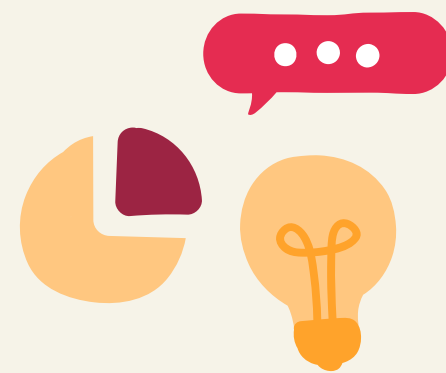
# Meet Bob

**The right technology is essential.**

Bob is designed and developed for the new world of work. On-site, hybrid work, and remote HR leaders can drive culture, two-way communication, engagement, performance, and compensation—all while streamlining and automating their own processes. All leaders and individual contributors in the organization can benefit from Bob by using it as a data source

and report generation tool for planning and tracking.

Bob's innovative UI, automated processes, and integrations with leading third-party tools ease administrative tasks for everyone across the organization and make even the most mundane work tasks pleasant, intuitive, and engaging—and not just for HR admins. Bob puts people first with culture tools that connect co-located and remote employees to their fast-growing, global companies.



## For managers

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



## For HR

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



## For employees

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

# Now is the time to make smarter decisions when it comes to your people and organization

To learn more about HiBob and our data-driven tools, get in touch with us at [contact@hibob.com](mailto:contact@hibob.com)

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