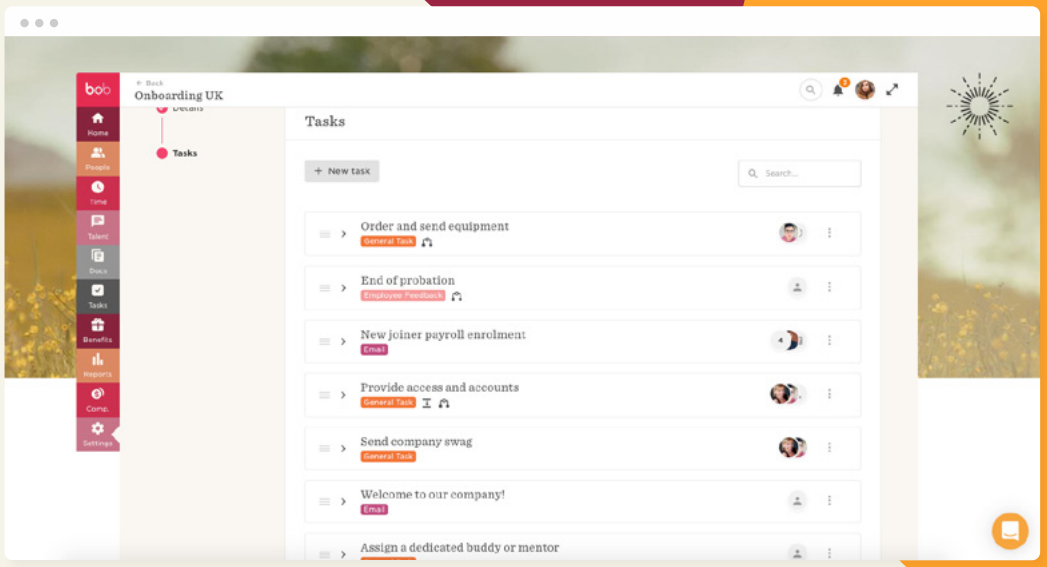
HOW TO AUTOMATE HR PROCESSES

USING TASK LISTS



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Introduction

Forgetting a friend's birthday: awkward but forgivable.

When it comes to your teammates and employees, however, forgetting the little things isn't an option. While none of our brains are perfect, there are occasions where managers and HR can't mess up, such as introducing new hires, celebrating birthdays, and addressing personal and professional milestones.

So what do you do?

You rely on your tech stack. We haven't built an army of thinking robots yet. Still, we have several tools (yes, including bob) that can help us do better work, mitigate human error, and increase productivity.

To help you stay on top of things and your teammates feel valuable, we created Task Lists: An automation feature in bob that allows you to build chains of events, one triggering another, so you can set it, forget it, and still keep everyone happy.

Meet some of our favorite Task Lists, built for people-first cultures.

Task List dictionary

Before we get started on Task List templates, let's go through the terminology.

Term	Definition
Task List	A group of tasks under the same process or event, such onboarding tasks or work anniversaries.
Scheduling criteria	The triggers that determine whether a task can take place. If you set the task list to be triggered automatically, the auto-scheduling criteria will be the **number of days before or after an event**, such as start date, termination date, or change of address.
Target group	The employee criteria that the Task List is applied to. This can be based on any field and employee data, such as site, department, and employee type.
Task name and type	Tasks can be **general**, needing to be marked as done by the assignee; **email**, a notification that can be sent out internally or externally, and **employee feedback**, requesting and collecting employees feedback based on any lifecycle event.
Assignee	The performer of the task.

Task List templates

We've chosen a few of the office's most common people occasions and made them into templates:

1. **Birthday wishes**
2. **Promotions and internal movement**
3. **Remote onboarding**
4. **Office-based onboarding**
5. **Offboarding**

We've noted which tasks are for admin, managers, and employees using these symbols:

Admin Manager Employee

1. Birthday wishes

Task List name: Birthday wishes **| Scheduling criteria:** 5 days before an employee's birth date **|**
Target group: All employees

1.1

Happy birthday to your employee

Direct manager

Hi [direct manager name],
[employee's name]'s birthday is coming up! Make sure you don't forget to say happy birthday!

☐ **Due date**
Employee's birthday

1.2

Happy birthday [employee name]!

From: Manager
To: Employee

Message:

[employee name],
Wishing you a day filled with happiness and a year filled with joy.
Happy birthday!
We're so glad to have you here!
[manager name]

1.3

Enjoy a team lunch

Manager

It's [employee name]'s birthday in three days!
Wouldn't it be great if all the team went out for lunch?
Let's plan something special.

☐ **Due date**
3 days before the Employee's birthday

1. Birthday wishes

1.4

Birthday desk decoration

Admin

It's [employee name]'s birthday tomorrow! Can you please decorate their workspace with some cute signs and sweet treats? Thank you!!

☐ **Due date**
1 day before the Employee's birthday

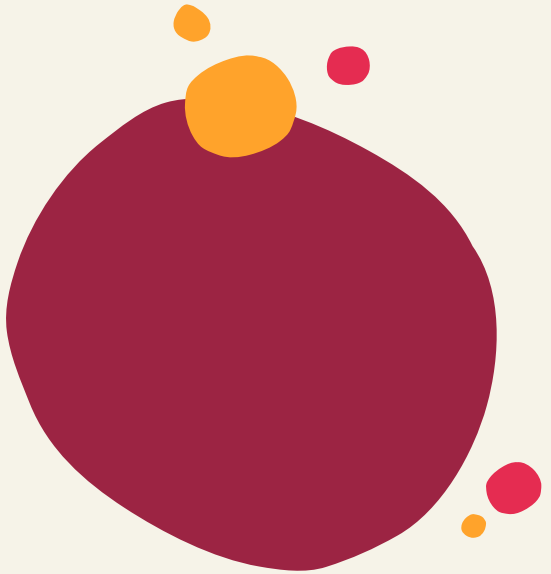
1.5

Monthly group birthday

Admin

It's [employee name]'s birthday! Please make sure to include them with this month's birthday employees to celebrate their birthday with the management team.

☐ **Due date**
Employee's birthday



2. Promotions and internal movement

Task List name: Internal change **| Scheduling criteria:** Trigger manually after a promotion or internal mobility **| Target group:** All employees

2.1

Celebrate internal mobility

Manager

Communicating opportunities across all channels are crucial to maintaining dynamic, strategic internal mobility. Share [employee name]'s movement across the company to inspire others.

☐ **Due date**
On the selected date

2.2

Internal mobility—employee feedback

Employee

Ask employees who have moved across teams for feedback on the transition, onboarding, and succession plans and programming.

2.3

Make sure all equipment is in place

Admin

Order and send out the necessary equipment to [employee name] before their first day in their new position.

Checklist:

- Computer
- Cables, adapters, and chargers
- Headphones
- Keyboard and trackpad

☐ **Due date**
5 days before the selected date

2. Promotions and internal movement

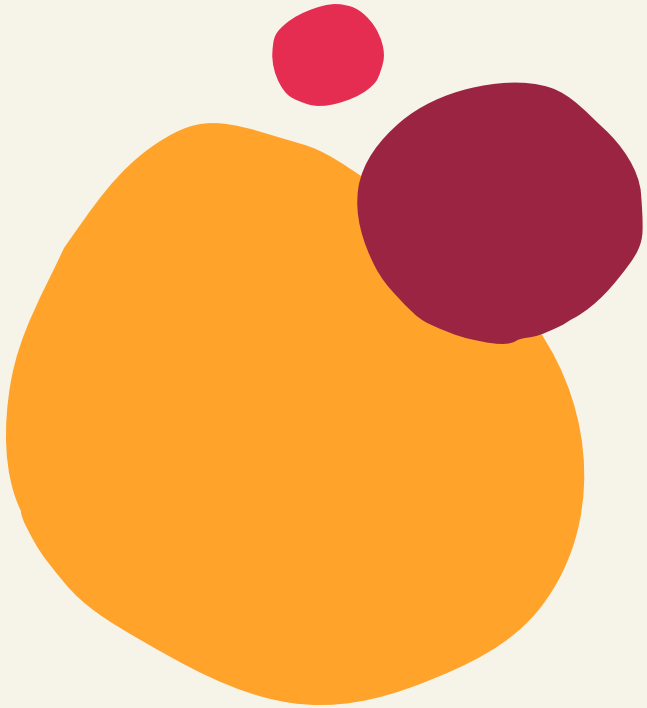
2.4

Schedule internal mobility guidance

Admin

Schedule a meeting with [employee name] to ease the internal mobility process, set expectations, and answer any questions

☐ **Due date**
2 days before the selected date



3. Remote onboarding

Task List name: Remote onboarding | **Scheduling criteria:** Selected once the employee works remotely | **Target group:** All employees

3.1

Order and send equipment

Admin

Order and send out the necessary equipment to [employee name] before their first day of work, such as:

- Computer
- Cables, adapters, and chargers
- Headphones
- Keyboard and trackpad

☐ **Due date**
2 days before the selected date

3.2

Send company swag

Admin

Make [employee name] feel welcome by sending a swag package, including branded items like a t-shirt, notebook, or bag.

☐ **Due date**
1 day before the selected date

3.3

Assign a dedicated buddy or mentor

Manager

Set [employee name] up with a buddy to help onboard them smoothly.

☐ **Due date**
2 days before the start date

3. Remote onboarding

3.4

Provide access and accounts

Admin

Provide [employee name] with access and accounts for role-specific tools, platforms, and systems.

☐ **Due date**
On the start date

3.5

Arrange for IT training

Admin

Schedule an IT training session with [employee name] to explain how your company tools, systems, and platforms work.

Let them know how to reach the IT team and how to request any additional equipment or support.

☐ **Due date**
2 days after the start date

3.6

Share company culture and values

Admin

Share online materials to help[employee name] get to know the company better:

- Your employee handbook in digital format
- Presentations or literature on your company values
- Organizational chart
- Code of conduct

☐ **Due date**
On the start date

3. Remote onboarding

3.7

Provide access and accounts

Manager

Provide [employee name] with access and accounts for role-specific tools, platforms, and systems.

☐ **Due date**
On the start date

3.8

Set work from home [WFH] policy

Manager

Tomorrow's the big day! Send [employee name] an email to say hi and get them excited for their new start.

☐ **Due date**
1 day before the start date

3.9

Welcome [employee name]!

From: Manager

To: Employee

Message:

[employee name],
Congratulations on your new role as [employee job title]!
We're so glad to have you here!
[manager name]

3. Remote onboarding

3.10

Post a Shoutout to welcome your new joiner

Manager

Today's the day! Introduce [employee name] to the company. Include their job title, work background, hobbies, and interests.

☐ **Due date**
On the start date

3.11

Team introduction

Manager

Introduce [employee name] to the team on a video call.

☐ **Due date**
On the start date

3.12

HR intro

Admin

Please take the time to schedule a video call with [employee name] to ease the onboarding process, get to know each other, and share HR processes and policies.

☐ **Due date**
On the start date

3. Remote onboarding

3.13

Setting goals and expectations

Manager

Take some time to set professional goals and expectations for [employee name]—both short- and long-term plans.

☐ **Due date**
7 days after the start date

3.14

Further learning

Admin

We're two days in! Send [employee name] some online courses or recordings to prepare them for their role.

☐ **Due date**
2 days after the start date

3.15

Check-in and review planning

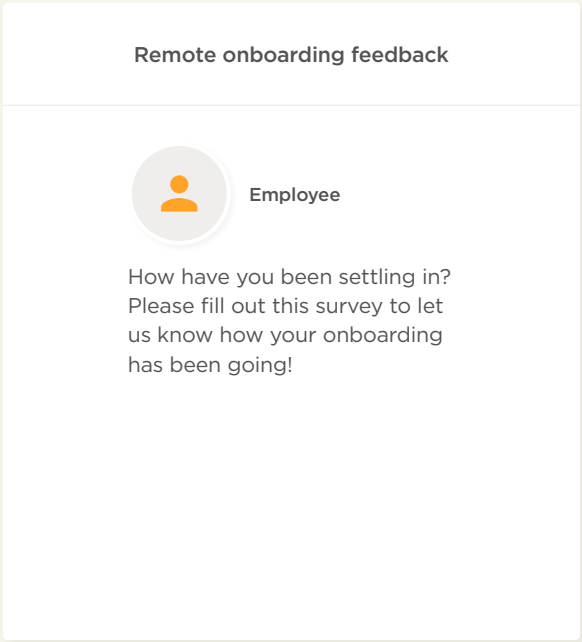
Manager

Now that [employee name] is settled in, schedule 1:1 meetings and reviews to check in on their work and progress.

☐ **Due date**
7 days after the start date

3. Remote onboarding

3.16



4. Office-based onboarding

Task List name: Onboarding | **Scheduling criteria:** 14 days before the start date | **Target group:** All employees

4.1

Open company email

Admin

Open an official company email account for [employee name]. Without this, you won't be able to invite them to bob.

☐ **Due date**
1 week before the start date

4.2

Open system user

Admin

Working in Google Apps, Slack, Git, Asana, or Trello? Share bob with [employee name] by opening a new user account for them.

☐ **Due date**
1 week before the start date

4.3

Add new employees to relevant email groups

Admin

Add [employee name] to all relevant email group lists, distribution lists, internal/office phone lists, and websites. Things work well when everyone feels connected.

☐ **Due date**
1 day before the start date

4. Office-based onboarding

4.4

Set up office space and welcome kit

Admin

Does [employee name] have a space of their own? Make sure they have a welcome pack to make them part of the team.

☐ **Due date**
1 day before the start date

4.5

Welcome lunch date

Manager

New starters should never eat their first lunch alone. Take [employee name] out for a great meal, and don't forget to pay!

☐ **Due date**
1 day after the start date

4.6

Make your new starter feel really welcome

Admin

Flowers, chocolate, lunch, or just a great personal note can make [employee name] feel welcome.

☐ **Due date**
1 day before the start date

4. Office-based onboarding

4.7

Set up new joiners orientation

Admin

The more new starters you invite to orientation, the better [and more fun] it will be. Get [employee name] involved!

☐ **Due date**
On the start date

4.8

Send welcome email to employee

Manager

Tomorrow's the big day! Send [employee name] an email to say hi and get them excited for their new start.

☐ **Due date**
1 day before the start date

4.9

Welcome [employee name]!

From: Manager

To: Employee

Message:

[employee name],
Congratulations on your new role as [employee job title]!
We're so glad to have you here!
[manager name]

4. Office-based onboarding

4.10

Company intro email

Manager

Make [employee name] feel like they belong by sending a welcome email to the entire company. The little things can make all the difference.

☐ **Due date**
1 day after the start date

4.11

Benefits and pension plan

Admin

[employee name] expects an excellent pension plan, so make sure to enroll them.

☐ **Due date**
30 days after start date

4.12

Glad you're here! Onboarding feedback

Employee

How have you been settling in? Please fill out this survey to let us know how your onboarding has been going!

5. Offboarding

Task List name: Offboarding **| Scheduling criteria:** 5 days before termination **| Target group:** All employees

5.1

Team communication

Manager

It's time to communicate [employee name]'s leaving.

It's always better to be in control and proactive about people leaving, rather than letting the rumor mill do the work for you and finding that it's been positioned wrongly or negatively.

☐ **Due date**
10 days before the termination date

5.2

Return of equipment and company assets

Admin

Does [employee name] have a company phone, credit card, or car? Make sure you get everything back in the next five days.

☐ **Due date**
5 days after the termination date

5.3

Having the employee sign form P45

Admin

Having [employee name] sign form P45 before they sign off permanently.

☐ **Due date**
5 days before the termination date

5. Offboarding

5.4

Cancel company credit card

Admin

Make sure you've canceled [employee name]'s credit card unless agreed upon otherwise.

☐ **Due date**
1 day after the termination date

5.5

Exit interview with the employee

Admin

This is a crucial meeting. People are often at their most honest and, in some respects, fearless as they get closer to the end of their employment, so use this as a valuable opportunity to learn about the business from their eyes and send them off as positively as possible.

☐ **Due date**
1 day before the termination date

5.6

Dismissal notice after termination

Admin

[employee name] needs to know formally in writing that they are being dismissed. Make sure you include all the relevant details according to legal and company standards.

☐ **Due date**
On the termination date

5. Offboarding

5.7

Make any outstanding payments to the departing employee

Admin

Ensure all payments are complete, including but not limited to salary, holiday pay, and expenses.

☐ **Due date**
2 days after the termination date

5.8

Prepare a knowledge transfer plan

Manager

When someone leaves the company, make sure no information gets lost. Build a handover plan for knowledge transfer.

☐ **Due date**
14 days before the termination date

5.9

Remove all personal items from offices or lockers

Admin

Ensure [employee name] collects all their personal belongings and makes sure you have a forwarding address if they leave anything behind

☐ **Due date**
On the termination date

5. Offboarding

5.10

Remove employee from the website and from the company contact list

Admin

Remove [employee name] from websites and company contact lists.

☐ **Due date**
1 day after the termination date

5.11

Remove the employee from all internal communications, groups, and tools

Admin

Make sure [employee name] no longer has access to groups, email, and docs to protect your company's information.

☐ **Due date**
1 day after the termination date

5.12

Say goodbye with a smile - have a going away party or lunch with the team and close friends

Manager

Always try to let people leave on a high. After all, what they say about your business in the future is critical!

☐ **Due date**
On the termination date

5. Offboarding

5.13

Thank the existing employees, make them feel valuable

Manager

Thank the employees who aren't leaving for their hard work. This can have a significant impact and make them feel valued and secure.

☐ **Due date**
On the termination date

5.14

Termination feedback

Employee

When someone leaves the company, make sure no information gets lost. Build a handover plan for knowledge transfer.

Automation is the future

We used to have notebooks, and we used to have Calendar pings. Now we have Task Lists keeping us in order.

By setting up customizable Task Lists, you can keep your HR processes organized without endless reminders and sticky notes. Imagine what you can do with all the time you'll save.

In 2020, it's 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

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