Checklist: Ease staff management with automated tools
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Managing employees effectively is essential to your success, but it’s time consuming: Business mentoring organization SCORE estimates that it occupies up to 35 percent of a small business owner’s time. Automating some of the work involved can free you to focus on other priorities.

Use this checklist to identify the staff management domains that might benefit most from automation. Even tackling just one or two could lighten your load considerably.

○ **Scheduling.** If you create staff schedules manually, review online scheduling tools to determine whether you can streamline this task. Scheduling software and apps—When I Work®, Shiftboard®, ShiftPlanning®, and others—let you view staff availability and shifts to fill so that you can easily create schedules. After you complete a schedule
in these tools, communication features let you notify employees via email and text messaging. Industry-specific scheduling tools are also available for restaurants, delivery companies, and other types of businesses.

- **Hiring.** The steps involved in finding new employees—posting job ads, reviewing resumes, conducting interviews—can take a lot of time and coordination. Identify where your bottlenecks are to see where technology could make the process more efficient. Consider whether you could benefit from a tool that automatically posts job descriptions on multiple sites and provides a central space for gathering resumes and interview notes. Workable, Comeet, and ApplicantPro are a few small business-focused tools that provide these features. As you evaluate these and other services, look for additional features that could save you time, such as customizable job description templates or screening tools.

- **Time tracking.** Recording hours is essential in many companies, but manual tracking can lead to inaccuracies or lost revenue. To determine whether a digital tool could help, consider your needs. For example, are you primarily concerned with tracking time spent on different projects, or do you need a dependable way to capture hours worked at different locations? Services such as TSheets, Hubstaff, and Timesheets.com automatically...
log time spent on different projects or tasks and include geolocation features to help capture accurate reports of hours worked remotely. If you use such a tool with geolocation features, be sure to inform employees that their locations could be tracked. Decide whether extras, such as time-off request management and alerts when employees are approaching overtime, would also be useful.

- **Payroll.** Handling payroll yourself may be feasible if you have one or two employees, but as you grow, the task becomes more time consuming and error prone. Evaluate online tools that can simplify core tasks, such as cutting checks, calculating and filing payroll taxes, and handling tax forms. As you review these services, including Intuit® Payroll, Wagepoint, OnPay™, and others, consider which features would benefit your business most. For example, you may need a service that supports certain types of deductions, such as for retirement plan contributions, or that lets you easily rerun payroll in case of an error. Try not to pay for more than you need when choosing a service, as some include human resources features that may not be useful to your business.

- **Performance monitoring.** If you rely on annual reviews to give employees feedback on their performance, you may overlook examples—both good and bad—that occurred months before. Consider whether using a tool that lets you track
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Performance year-round could save you time preparing reviews and provide better results. Look for features that would be particularly useful to your business, such as space for compiling notes throughout the year that you can refer to come review time, or a mechanism for setting and tracking employee goals. Small Improvements, TINYpulse™, and People® are a few low-cost performance-monitoring tools geared toward small companies.

Benefits management. Offering health and other benefits to employees can help keep them on board and potentially provide a tax credit. If you offer these benefits or are considering doing so, review online benefits management services that let employees make changes or updates to their plans, which can minimize your time spent on administrative tasks. Cloud-based tools like Zenefits and Gusto allow employees to enroll in plans online, view their plan information, and make changes directly. Compare these tools and consider whether other features, such as assistance researching health plans or tight integration with payroll, could also benefit your business.