



# HR At a Glance: HR Systems

A Practical Desk Reference for Small Business Leaders

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| <b>EMPLOYEE LIFECYCLE</b><br><i>Most small businesses manage people reactively. Mapping the employee lifecycle creates consistency from hire to exit.</i>                                                                                                                                                                                                                                                                  | <b>DOCUMENTATION &amp; PROCESSES</b><br><i>Documentation feels like extra work until you need it. Good processes protect the business and the employee.</i>                                                                                                                                                                                                                                                                                       | <b>HR TECHNOLOGY</b><br><i>HR tech doesn't have to be expensive or complex. The right tools save time and reduce errors.</i>                                                                                                                                                                                                                                                                                                                |
| <b>EMPLOYEE LIFECYCLE</b><br><i>Map every stage of the employee experience before problems arise.</i>                                                                                                                                                                                                                                                                                                                      | <b>DOCUMENTATION &amp; PROCESSES</b><br><i>Consistent documentation reduces risk and supports fair treatment.</i>                                                                                                                                                                                                                                                                                                                                 | <b>HR TECHNOLOGY</b><br><i>Technology should support your process, not replace it.</i>                                                                                                                                                                                                                                                                                                                                                      |
| <b>Key Actions</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Hire-to-exit lifecycle mapped</li><li><input type="checkbox"/> Roles and responsibilities defined at each stage</li><li><input type="checkbox"/> Performance review process established</li><li><input type="checkbox"/> Offboarding process documented</li><li><input type="checkbox"/> Employee experience reviewed annually</li></ul> | <b>Key Actions</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Employee handbook current and accessible</li><li><input type="checkbox"/> Job descriptions on file for all roles</li><li><input type="checkbox"/> Offer letters and agreements documented</li><li><input type="checkbox"/> Performance and disciplinary records maintained</li><li><input type="checkbox"/> HR processes written down, not just known</li></ul> | <b>Key Actions</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Payroll system accurate and compliant</li><li><input type="checkbox"/> Employee records stored securely</li><li><input type="checkbox"/> Time and attendance tracked consistently</li><li><input type="checkbox"/> Onboarding and offboarding automated where possible</li><li><input type="checkbox"/> HR data reviewed regularly for accuracy</li></ul> |
| <b>Red Flags</b> <ul style="list-style-type: none"><li>• No defined process for exits or transitions</li><li>• Performance issues handled inconsistently</li><li>• Lifecycle stages exist only in someone's head</li></ul>                                                                                                                                                                                                 | <b>Red Flags</b> <ul style="list-style-type: none"><li>• Handbook not updated in years</li><li>• Verbal agreements instead of written ones</li><li>• No records of performance conversations</li></ul>                                                                                                                                                                                                                                            | <b>Red Flags</b> <ul style="list-style-type: none"><li>• Payroll run manually with no audit trail</li><li>• Employee records stored in spreadsheets or email</li><li>• No system for tracking time, leave, or performance</li></ul>                                                                                                                                                                                                         |
| <b>Lean in HR Tip</b><br>If your HR process lives in one person's memory, it's a liability, not a system.                                                                                                                                                                                                                                                                                                                  | <b>Lean in HR Tip</b><br>Documentation is not bureaucracy. It's protection for you and your employees.                                                                                                                                                                                                                                                                                                                                            | <b>Lean in HR Tip</b><br>You don't need enterprise software. You need the right tool for your size and stage.                                                                                                                                                                                                                                                                                                                               |

## KELLY'S RULES OF HR SYSTEMS

1. Systems create consistency.
2. Simpler is usually better.
3. Document once, use often.
4. Processes reduce risk.
5. Good systems support growth.

### HOW URGENT IS THIS?

#### ADDRESS TODAY

- Open role with no job description on file
- Employee records stored only in email or paper
- Payroll process with no documentation or audit trail
- New hire starting with no onboarding checklist

#### ADDRESS THIS WEEK

- Employee handbook not reviewed or updated
- No written process for performance conversations
- HR technology not set up or used consistently
- Offboarding process not documented

#### ADDRESS THIS MONTH

- Full employee lifecycle mapped and documented
- Core HR processes written down and accessible
- HR technology evaluated for current business size
- Documentation audit completed for all active employees

### BEFORE YOU BUILD YOUR HR SYSTEMS

Before investing in new tools or processes, ask yourself:

- |                                                                                 |                                                                                        |
|---------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> Do I know what HR processes I actually have in place?  | <input type="checkbox"/> Does my team know where to find HR information?               |
| <input type="checkbox"/> Are my employee records complete, current, and secure? | <input type="checkbox"/> Are my processes written down or just in someone's head?      |
| <input type="checkbox"/> Is my payroll process documented and auditable?        | <input type="checkbox"/> Would my current systems hold up to an audit or legal review? |

*Most HR system gaps aren't about technology. They're about discipline. A simple, documented process used every time beats a sophisticated system that nobody follows. Start with what you have, write it down, and build from there.*

## Need a Second Opinion?

Take the free HR Snapshot to find out where your HR systems stand and what to fix first.