



Tanya Frasier
SANDY'S ICE CREAM

A FORCE FOR CHANGE

Age

45

Position

Director of HR

Level of Tech Literacy

Highly capable

Company Description

Sandy's is a successful ice cream chain that began in Cleveland, Ohio and expanded around the region. They're making a push to expand nationally.

AMBITIOUS | DETAIL-ORIENTED | DECISIVE

MOTIVATION

INCREASE PRIVACY, DECREASE PAPER STACKS

Like many HR departments, Tanya's is drowning in paper. In particular, FMLA requests are stressing her out. These requests contain private information that must only be viewed by certain staffers on the HR team. The processes to manage the FMLA requests and other sensitive documents are doing little more than adding more steps to the day. Tanya needs a solution that will help her department be more efficient and eliminate steps while increasing document security.

WE ALL GROW TOGETHER

The business is expanding, and Tanya's HR department must be ready to support that growth with hiring and retention efforts. They must have a smooth system in place to successfully support new locations and employees.

"TAKE THE CHAINS OFF MY DESK!"

Tanya knows a paperless office is a possibility and she's ready to take the leap. She wants the freedom to work from anywhere with the knowledge that she can view, approve, or re-route at any document from any time period, or at any point in its lifecycle.

KEY FEATURES

FORM FILL

Using a form fill platform will allow Tanya and her team to review metadata effortlessly, instead of reviewing every individual application, to get the pertinent information that will speed up the hiring process.

BEHAVIORS

RELUCTANT MICROMANAGER

Tanya trusts her staff, but everyone makes mistakes. She hates double-checking everyone's work (and fixing errors) but without a system to keep things on track, she sees no other option.

EFFICIENCY AND ORGANIZATION STAR

Despite the waves of paper that crash through her office every day, Tanya is keeping her head above water. Her knack for efficiency has kept her department afloat through major growth, but she's not sure she can handle much more.

UP AND COMING STRATEGY LEADER

Tanya has big ideas for improving the company, but processes and paperwork to be attended to are taking all her time. She'd love the freedom to focus on strategy.

GOALS

IMPROVE HIRING AND RETENTION PROCESSES

Tanya's HR department wants to spend more time growing and nurturing their workforce – tending to the backbone of their company. They'd like smoother processes throughout the employee lifecycle – from hiring, to onboarding, to leave requests, to annual reviews – and would love to automate certain processes in order to spend more time with employees.

AUTOMATED WORKFLOW

Tanya's team should automate certain tasks so that human error won't affect compliance or productivity. FMLA requests, specifically, are a great fit for automation technology. Requests are directly routed those who perform specific actions and are only accessible to authorized individuals.

COMPLIANCE ACROSS THE BOARD

Tanya must work within complex government regulations and internal corporate policies, and ensure that her employees are in line with those regulations and policies, as well as the standards she has set for her department. Her software solution must have options to help safeguard compliance in a number of areas – including tracking, retaining, and destroying documents.

BOOST THE BOTTOM LINE

Everything has an associated cost – the time it takes for employees to do work, the time it takes to fix mistakes, the space occupied by filing cabinets, the time it takes to search them, the time it takes to train. Tanya needs a software solution that, with everything considered, improves the company's finances.

“We're already working pretty hard. I need to find something that enables us to work smart.”

GOVERNANCE AND RETENTION TOOLS

A variety of regulations dictate how long HR departments must keep certain documents. Tanya can solve this problem using technology that possess governance options. She and her team can program an automatic action to purge an item from the system once it reaches a specified date.