




# Oak Tree Mobility plants the seeds to success with Staffology HR



Customer Story



A woman with dark hair tied back, wearing glasses and a red shirt, is sitting at a desk in an office. She is looking at a laptop screen with a thoughtful expression, her hand resting on her chin. The background shows a window with bright light. The image is overlaid with a purple semi-transparent shape that contains the text.

## **Oak Tree Mobility is the UK's leading mobility specialist, providing people up and down the country with the equipment they need to live independently.**

We spoke to Jen Bush, HR Manager, about their HR processes. Unfortunately, it's a familiar story: an expert HR team bogged down with legacy paperwork and manual processes, leaving them unable to focus on strategy.

With around 75 people in the business in a range of roles, paper forms were building up on desks, and the problem was only compounded by the lack of proper reporting tools. These complex paper-based HR processes were slowing the business down and doing nothing to boost employee engagement.



## The move from paper to digital

Having only joined the business seven months ago, Jen inherited a mission-critical project: moving the HR process to Staffology.

***“The previous HR officer, along with my manager, who’s more of a finance person, really pushed for IRIS Staffology to be implemented and moved away from the previous system. With the previous system, it was only being used for some things, with other information being recorded on spreadsheets or paper. IRIS Staffology offered better reporting and just gave us better visibility over our HR by bringing it all into one place.”***

Coming in at this stage, Jen had some work to do, moving years of legacy forms to their new streamlined system.





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*“We have put all our manager forms that used to be really paper-heavy, like ATRs and new employee detail forms, on Staffology. We’ve put in return-to-work forms, we’ve set up a lot of auto-event notifications, and we’ve just run a whole appraisal process which isn’t something we’ve ever done before. So, we’ve been able to move away from a lot of paper and manual processes and get everything online through Staffology, which has been a big time-saver, but also means we’re doing a lot more for our employees.”*



## “ Cutting down on time-wasting processes

Once they got going on Staffology, it didn't take long for the business to start reaping the rewards of their new digital processes. We asked Jen how much time she's been saving as a result:

*“Loads of time actually! Using the forms has eliminated a lot of spreadsheets, which can be slow and difficult to manage. We need to have an ATR (Authorisation to recruit form) that goes from the manager to the finance director to HR, but because it was a paper form, it would go from the manager to HR, HR would print it off, they'd give it to a colleague, who would scan it and sign it off – it was just a very time-consuming process. Whereas now it can be done in about 40 minutes.”*



***“We also had an issue previously where forms might not be filled in correctly, but now that we’re sending them digitally with mandatory sections to complete, we’ve cut out that bit of time where we would previously have to go back and check and chase. It’s a much-improved process for everyone involved.”***

With all the time saved, Jen was freed up to focus on a more important strategic task: getting their sister company’s HR machine online.





## Setting up the sister company

Oak Tree Mobility's sister manufacturing company needed a solution to their absence calendar woes – and, to make it worse, staff needed to access the whole HR system using only their phones.

Staffology's mobile app was the perfect solution.

*“I think the team likes the fact that they can now book holidays themselves, but they can also use the group absence calendar so they can see who's off at the time. That's made the holiday booking process much better, simply by giving them that visibility. For managers in particular, going from a spreadsheet to being able to see the whole team's annual leave in one place is so much easier.”*

*“Going forward, we're hoping to use the documents tab to start merging documents and sending them digitally so they can sign them from their phones, which again, will be a huge timesaver for them and for us.”*



## Meeting colleague's impossible requests

As Jen moved more and more of their processes onto the Staffology system, she discovered an unexpected benefit: she was gaining a reputation as the business's fix-all solution thanks to the Staffology system's flexibility.

*"I feel like every time I'm asked for something, we make it happen, so our team is really happy with that! Our account manager at IRIS has been great at getting back to me and we've managed to find workarounds for things that might not be a standard request!"*

As more and more of her colleagues' issues were fixed, they quickly found that they didn't have much use for disparate spreadsheets anymore and could start working collaboratively together in the same system.

*"Staffology does everything that an HR person needs it to do. There's not much where we're like, 'Oh, we'll have to do that spreadsheet-wise.'"*







## Making appraisals appealing

Before Staffology, appraisals were not something that happened at Oak Tree Mobility. Now, thanks to easy software, employee engagement is better than ever.

***“When it came to objectives, everyone kept saying ‘Well I don’t have any objectives’, so we’d just leave that area blank. Now, we have had our first company-wide run of appraisals which has meant every member of staff has had time with their manager to communicate and reflect. Employee engagement has improved, as everyone has easy access to their employee objectives and knows exactly what they are aiming for. It’s a fantastic way to keep everyone on track and Staffology allows us to record this information in an easy and accessible way.”***





## Merging payroll and HR

With her HR processes starting to tick over comfortably on the Staffology system, Jen has set her eyes on the next step towards streamlining the business: bringing their payroll under the same roof.

***“I’d quite like to look into Staffology payroll as one of our next steps. It makes sense to have an integrated HR and payroll system, and I think that will be our next mission.”***

Once Staffology HR and Payroll are working together in perfect sync, Oak Tree Mobility’s back-office processes will be an unstoppable machine.



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## Is Staffology right for your business?

We asked Jen if she would recommend Staffology, and the answer is an emphatic yes!

*"I absolutely would recommend Staffology as an HR system. It's allowed us to tighten up our processes and take control of our HR, helping to improve our employee engagement by giving the team better visibility."*

Are you looking to ditch the spreadsheets, and free up time for strategic HR? Get started today by visiting the Staffology website: [www.staffology.co.uk/hr-software](http://www.staffology.co.uk/hr-software)

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