CONCEPT

HR Automation and HR Process Digitisation: Routing, RPA Bots and Templates

14 – 18 June 2027
London - Central London four-star



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Introduction:

HR automation stalls when HR teams buy bots and low-code tools for transactions that are still paper-heavy, keyed twice and approved by email. Joiner packs, absence requests, salary certificates, transfers and offboarding clearances then move faster but stay wrong. This Core Concept course gives HR operations, HR technology and HR transformation practitioners a vendor-neutral method to pick transactions worth digitising, simplify them first, then apply routing rules, RPA scripts, request portals, chat assistants, document templates and interfaces under proper controls. Participants build an HR Automation Roadmap and Business Case for a scenario HR function.

Course Objectives:

- Score HR transactions for automation potential by volume, rule stability, exception rate and impact on staff
- Simplify joiner, absence, certificate, transfer and offboarding transactions before digitising them by cutting redundant sign-offs and double keying
- Specify approval routing, attended and unattended RPA scripts for pay inputs, and templated letters with e-signature
- Plan record flows from applicant tracking to the core HR platform and the pay run, with reconciliation checks
- Set segregation of duties, audit logs, bot credentials and privacy controls for automated HR transactions
- Build an HR Automation Roadmap and Business Case with benefit measures, adoption actions and release waves

Target Audience:

- HR operations leads who own joiner, mover and leaver transactions, HR letters and pay input cut-offs
- HR technology specialists who configure routing rules, request portals and interfaces between HR platforms
- HR transformation and digitisation leads who select and sequence HR improvement initiatives
- Pay and time-and-attendance leads responsible for accurate monthly pay inputs and variance checks
- HR shared services supervisors whose teams process high volumes of repetitive staff requests

Course Outline:

Day 1: HR Automation Landscape and Transaction Inventory

- HR Automation Spectrum: Routing Rules, RPA Scripts, Chat Assistants, Low-Code Forms and Direct Interfaces
- Joiner-Mover-Leaver Transaction Inventory with Volumes, Handling Minutes and Rework Counts
- Automation Suitability Scoring: Rule Stability, Exception Rate, Input Structure and Staff Impact
- Spreadsheet, Email and Paper Workaround Audit Across HR Teams
- HR Digitisation Maturity Grid and Quick-Win Versus Foundation Candidate List

Day 2: Simplify Before You Automate: HR Transaction Redesign

- SIPOC and Swimlane Mapping of Joiner, Transfer and Offboarding Clearance Journeys
- Sign-Off Step Elimination Using Authority Thresholds and Auto-Approval Rules
- Standard HR Field Definitions and Single-Entry Principle for Staff Changes
- Future-State Transaction Blueprint with Trigger Events and Handoff Points
- Automation Pattern Selection: Orchestration Engine, Unattended Bot, Attended Bot or Direct Interface

Day 3: Digitising HR Transactions: Routing, Bots, Request Portals and Templated Documents

- Joiner Routing Design: Pre-Arrival Tasks, Equipment Requests and First-Day Checklists
- Absence, Transfer and Offboarding Clearance Routing with Escalation Timers and Delegation Rules
- Pay Input Bots: Timesheet Collection, Allowance Changes and Variance Flagging Scripts
- Request Portal Journeys and HR Chat Assistant Intent Library for Routine Queries
- Letter, Certificate and Contract Templates with Merge Fields and E-Signature Routing

Day 4: HR Interfaces, Automation Controls, Privacy and Failure Modes

- Applicant Tracking to Core HR to Pay Run Record Flow Mapping and Reconciliation Checks
- Bot Credential Vaulting, Segregation of Duties and Change Control for HR Scripts
- Audit Log Requirements and Exception Queues for Automated Staff Changes
- Personal Information Minimisation, Retention Rules and Access Logging in Automated HR Flows
- Automation Failure Scenarios: Broken Screen Scripts, Duplicate Payments and Orphaned Approval Tasks

Day 5: Scenario Work: HR Automation Roadmap and Business Case

- Scenario HR Function Pack: Transaction Volumes, Headcount, Platform Map and Pain Points
- Scenario Build: Prioritised Automation Backlog with Suitability Scores and Release Waves
- Scenario Build: Benefit Model Covering Hours Released, Error Reduction and Turnaround Improvement
- Scenario Build: HR Team Adoption Plan with Role Changes, Upskilling and Bot Supervisor Duties
- HR Automation Roadmap and Business Case Presentation to a Mock HR Leadership Panel

Skills You Will Gain:

- HR Transaction Suitability Scoring
- HR Transaction Simplification
- Approval Routing Specification
- RPA Script Design for Pay Inputs
- HR Document Templating
- HR Record Reconciliation
- Automation Control Design
- HR Automation Benefit Modelling

Why Attend This Course:

- Leave with an HR Automation Roadmap and Business Case built on a scenario HR function and ready to adapt at work
- Avoid digitising broken HR transactions by removing redundant sign-offs and double keying before any bot or routing rule is built
- Present HR leadership with credible estimates of hours released, fewer pay errors and shorter waiting times for staff
- Compare HR digitisation choices with HR operations, pay and HR technology peers from industrial, services, public and healthcare organisations

Conclusion:

Automating HR pays back when transactions are simplified first, controlled properly and adopted by the HR team. The week moves from the transaction inventory and suitability scoring, through redesign and automation pattern choice, to joiner, absence, transfer and offboarding routing, pay input bots, request portals, chat assistants and templated letters, then into interfaces, bot controls, audit logs, privacy and failure scenarios. The final day produces an HR Automation Roadmap and Business Case for a scenario HR function.