

# Enterprise HR Administration: The Opportunity to Reduce Hidden Work

## Day in the Life Research

How enterprise HR admins get work done today — and where the platform can create leverage

June 2026




Gayle Denney  
Principal UX Researcher

# Study Details

*Understand how enterprise HR work actually gets done — and where complexity creates hidden effort, operational risk, and avoidable cost.*

## Grounded in 4 sources of insight



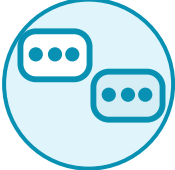
**Diary study**

*Real-world admin workflows*

---

**8**

participants



**Follow-up interviews**

*Why breakdowns happen*

---

**5**

participants



**Stakeholder interviews**

*Internal team perspective*

---

**11**

participants



**Operational data (PDRs)**

*Patterns at scale*

---

*PDR + escalation data*

# Different tasks. Different workflows. Same root problem.

*Observed across onboarding, termination, reporting, payroll, and coordination — on Paylocity and competitor platforms.*

## **System Exit**

Users leave the platform to finish work in Excel, email, paper, or external tools.

## **Manual Validation**

Admins check, compare, reconcile, and confirm because they do not fully trust the output.

## **Coordination Overhead**

Admins chase people, correct errors, and recover from incomplete or inaccurate data.

# Tool exits: where users leave the HCM

Every system exit is a signal that the workflow is not fully supported.

## Excel

- Data manipulation
- Pivot tables
- Validation
- Custom calculation
- Audit prep

**The most common exit point**

## Email

- Coordination
- Follow-up
- Approval requests
- Task tracking
- Communication with managers, IT, and benefits teams.

## Teams / Slack

- Real-time coordination
- Status updates
- Clarification
- Informal workflow handoffs across HR, payroll, and department teams.

## Google / web

- Compliance research
- State-specific requirements
- Legal interpretation
- External reference checks

## ChatGPT / AI

- Drafting communication
- Summarizing complex information
- Compliance interpretation
- Ad-hoc analysis — especially for time-pressed tasks.

## PowerPoint

- Building stakeholder outputs
- Presenting HR data
- Creating summaries that require formatting and narrative not supported natively.

Every exit represents an opportunity to bring that work back in-system through better tooling, automation, or AI assistance.



# Same platform. Different operating models.

*Enterprise HR admins aren't all working the same way — but hidden work shows up in both models.*

## Centralized HR

A dedicated team handles workflows end-to-end.

Main burdens:

- Admins must leave the platform to get a bulk of their work done.
- Admins don't fully trust system outputs.

*"I can't submit until I verify it myself."*

## Decentralized HR

Some HR duties are delegated to managers and staff at local branches.

Main burdens:

- Errors enter silently and travel forward.
- HR admins must catch and fix mistakes they didn't make, under deadline pressure.

*"I'm fixing problems I didn't create — and I'm accountable."*

**Different operating models create different forms of hidden work — but both push burden and manual work back onto HR.**

# HR is where enterprise workflow quality begins.

*The decisions and data entered in HR shape payroll, benefits, tax, reporting, compliance, and employee lifecycle workflows downstream.*

## DOWNSTREAM IMPACT WHEN HR DATA IS WRONG AT SOURCE

### Payroll Errors

- Wrong pay
- Missed cycles
- Manual corrections under deadline

### Benefits Mismatches

- Enrollment errors
- Coverage gaps
- Discovered after the fact

### Tax / Jurisdiction

- Penalties and amendments from incorrect jurisdiction setup

### Reporting Gaps

- Bad headcount and cost center data affecting business reporting

### Lifecycle Rework

- Status change and termination fixes cascading from upstream data

**When HR data is wrong at the source, the impact multiplies across every downstream workflow.**

# Meet 3 of the enterprise HR admins we interviewed.

*Different companies. Different platforms. Same hidden-work patterns.*

## Cindy

### HR Specialist/Payroll

- ROM-27 Restaurant Group
- 15,000 employees
- HCM: Paylocity
- Decentralized HR

## William

### HR Director

- UMass Lowell
- 4500 employees
- HCM: Peoplesoft
- Decentralized/Mixed

## Sarah

### Benefits + HR Generalist

- Ridgeview Health System
- 15,000 employees
- HCM: Paycor
- Centralized

# Cindy manages HR & payroll for 15K employees across 25 states.

**She must fix incorrect data entered by non-HR staff.**

## HOW IT WORKS AT ROM-27

- Store managers handle onboarding, including new hire's tax setup. Store managers are focused on running the store, not things like tax jurisdictions and compliance.
- The system accepts whatever input managers enter. Errors then surface during payroll, compliance, and reporting – Cindy must identify and fix those errors.
- Upstream HR data becomes the foundation for other workflows.

**25%** of time on error recovery

**\$10,000s** in external agency fees

**\$500–\$2,000** per compliance penalty

*“I’m fixing problems I didn’t create — and I’m accountable.”*

# The system should catch errors before Cindy has to.

*Three intervention points that would reduce error at source and downstream recovery cost.*

## Guardrails at Entry

Validate tax jurisdiction and other information at the point a manager enters it — state-specific prompts and flags before the record saves.

## Non-Expert Guidance

Plain-language prompts, tooltips, and required-field logic guide managers through setup — reducing bad data at the source.

## Early Error Detection

Surface at-risk records before they reach payroll — cross-module readiness scores flag issues when they're cheapest to fix.

*“If the system caught it at setup, I wouldn't have to chase it at payroll.”*

**William is in charge of the termination flow.**

**Termination involves 7 steps-most outside of the HCM.**

#### THE 7 STEPS

- 1 Initiate termination (email + verbal)
- 2 Gather case info (HCM + docs + messages)
- 3 Research compliance (Google + docs + AI)
- 4 Draft docs + comms (email + AI)
- 5 Coordinate IT, payroll, benefits (email + Teams)
- 6 **Validate completion ✓ HCM HANDLES THIS**
- 7 Close out + retain record (docs + comms trail)

*“The system doesn’t tell me it’s done — I have to figure that out.”*

# What if those other 6 steps also happened inside the platform?

## Compliance In-Flow

- State-specific rules surface at the moment of action — no more Googling final pay laws mid-workflow.
- Compliance guidance lives where the decision happens.

## Task Orchestration

- IT, payroll, and benefits tasks owned and tracked in one place.
- Automatic routing and escalation when steps go unacknowledged.
- HR stops chasing over email.

## AI Drafting + Audit Trail

- Letters drafted, reviewed, and sent inside the platform.
- Centralized audit trail captures every action — removing compliance risk from fragmented records.

*"It would save me so much time if, as I'm terminating an employee, the system can show me specific rules related to each state and other things I need to consider."*

**Sarah is keeping track of multiple status changes A status change is 6 steps.**  
**The platform records one.**

#### THE 6 STEPS

- 1 Receive change / exit trigger (email + verbal + HCM)
- 2 Determine compliance rules (Google + docs + AI)
- 3 Update records across modules (HCM + benefits + payroll)
- 4 Notify + coordinate teams (email + Teams)
- 5 **Validate completion ✓ HCM HANDLES THIS**
- 6 Close out + retain record (system + docs + comms trail)

*“I update the HCM record — but that doesn’t mean benefits actually stopped.”*

# What if those other 5 steps also happened inside the platform?

*Status change and benefits exit are high-risk, high-frequency — there is compliance exposure and manual coordination overhead in every event.*

## Compliance In-Flow

- State-specific rules and COBRA deadlines surface at the moment of action.
- No more off-system research.
- Compliance guidance lives where the change is processed.

## Cross-Module Orchestration

- Benefits, payroll, and IT tasks owned in one place.
- Auto-cascade updates across disconnected modules with a confirmation trail.
- HR stops chasing re-entry.

## Change Readiness + Audit Trail

- System confirms completion — admin doesn't have to.
- Change readiness flags incomplete steps.
- Centralized audit trail closes the compliance gap.

*"If I had a magic wand, I'd use it to be able to see status of the change. It's hard to keep track of what stage the change is at and who owns what. I wish I had some sort of dashboard."*

## The Bigger Pattern

# Hidden work is the real enterprise workflow problem.

Across organizations, systems, and operating models, we observed the same pattern: Hidden work accumulates when the platform doesn't own enough of the workflow.

### Validation

Admins manually verify outputs.

*Creates trust gaps.*

### Coordination

Admins manually move work forward.

*Creates invisible labor.*

### Compliance

Admins manually research requirements.

*Creates risk exposure.*

The result is higher effort, higher risk, and more system exits across enterprise HR administration.

**The result is higher effort, higher risk, and more system exits across enterprise HR administration.**

# Why start with HR?

Most enterprise workflows begin in HR — and improvements here compound across payroll, tax, benefits, reporting, and compliance.

## Workflows Begin Here

Hiring, onboarding, job changes, status changes, and terminations often start in HR.

## Data Powers Downstream Portfolios

The same HR inputs flow into payroll, benefits, tax, reporting, compliance, and lifecycle workflows.

## Improvements Compound

Better guidance, validation, and data quality upstream reduce downstream rework, risk, and hidden cost.

# Why enterprise HR work feels so heavy.

*These are the moments when their HCM doesn't meet their needs.*

## Trust Erodes

When admins must validate and correct system outputs manually, confidence in the platform declines.

### PRODUCT IMPLICATION

*Reliability and confidence become as important as features.*

## Cost Is Hidden

Significant effort lives outside visible workflows: checking, reconciling, coordinating, and correcting.

### BUSINESS IMPLICATION

*True operational burden is consistently underestimated.*

## Risk Concentrates in High-Stakes Moments

Payroll, tax, onboarding, compliance, reporting, and terminations are where errors create the most downstream impact.

### PRODUCT IMPLICATION

*These are the workflows where intervention matters most.*

## Fragmentation Weakens Enterprise Fit

When admins leave the system to finish critical work, the platform feels incomplete and less scalable.

### BUSINESS IMPLICATION





*This affects retention, expansion, and competitive position.*

*The opportunity is not just to improve feature coverage — it is to reduce hidden work, restore trust, and keep critical workflows inside the platform.*

# Opportunities to reduce hidden work

Four opportunities could materially reduce enterprise HR Burden.

## WHY THIS MATTERS

-  **1 Add Guardrails at High-Risk Entry Points**  
*High-trust, high-cost, compliance-sensitive moments where downstream correction is expensive.*
-  **2 Reduce Reliance on External Tools**  
*Repeated system exits are the clearest signal that the platform is not carrying enough of the workflow.*
-  **3 Make Workflow Ownership and Status Visible**  
*A large share of admin burden is coordination work that is currently invisible and unsupported.*
-  **4 Bring AI into the Workflow**  
*User appetite exists, but trust depends on transparency, reviewability, and staying inside the workflow.*

AI appeared across multiple workflows as a way to reduce research, drafting, reporting, and coordination burden—but only when paired with transparency and human review.

# 1 Add guardrails at high-risk entry points.

Upstream HR data quality drives downstream outcomes across multiple products and workflows.

## Tax & Jurisdiction Guardrails

- Validate tax jurisdiction at the point of entry.
- Implement state-specific prompts, smart defaults, and flags for high-risk codes — before the record saves.

## Guidance at Setup for Non-HR

- Guide managers and non-HR staff through setup.
- Use plain-language prompts and required-field logic to reduce bad data at the source.

## Early Error Detection

- Surface at-risk records before they reach downstream workflows like payroll.
- Institute cross-module validation and readiness scores to flag issues early.

*“If only they could give prevent managers from entering the wrong information up front. That would make my life so much easier.”*

2



## Reduce reliance on external tools.

Target the most common system exits — Excel, Google, AI searches, and manual documentation.

### Replace Excel Validation

- Provide in-system comparison, anomaly detection, and bulk validation tools.
- Give admins confidence without needing Excel or other tools.

### Bring Reporting In-System

- Provide flexible report filtering, grouping, and custom calculations without exporting.
- Natural language querying as a next step for admins who don't know field names.

### Embed Compliance Guidance

- Surface compliance rules, state requirements, and regulatory context inside the workflow.
- Eliminate Google and AI exits that happen during most compliance actions.

*"It would save me so much time if I could do everything in the system instead of having to use Excel, Google, and ChatGPT."*

3



## Make workflow ownership & status visible.

End reliance on other tools like Teams, Outlook, and spreadsheets by making ownership, status, blockers, deadlines, and handoffs visible inside of the platform.

### Live Workflow Dashboard

- Provide a centralized view of owner, status, blockers, and deadlines across active workflows.
- Prevent HR from having to rebuild status from scratch on every check-in.

### Automatic Routing & Escalation

- Route tasks to the right owner automatically.
- Escalate when steps go unacknowledged so HR can stop chasing.

### Centralized Audit Trail

- Auto-capture every action, handoff, and decision in a centralized record.
- Remove compliance risk from fragmented documentation across email and docs.

*“Coordination across IT, payroll, and benefits currently happens entirely over email.”*

## 4 Bring AI into the workflow.

The State of AI in HR 2026 Report finds 87% of HR leaders forecast greater AI adoption this year. Teams want workflow support, not incremental features.

### Natural Language Reporting

- Allow admins to query data in plain language without knowing field names.
- Eliminate the export-to-Excel workaround that happens when the platform can't answer a question.

### In-Flow Compliance Guidance

- Surface state-specific rules at the moment of action, embedded in the workflow step where the decision happens.
- Do not require a separate lookup.

### AI-Assisted Drafting

- Allow users to draft termination letters, notices, and communications inside the platform.
- Allow for human review before sending.
- Offer a centralized audit trail for every action.

# Where Should We Invest First?

The research has surfaced the pattern. The decision ahead is where to act first.

## Align on 1–2 priorities

- Identify which workflow opportunities to pressure-test first with Product, Design, and Engineering.
- Start where pain, evidence, and feasibility intersect.

## Translate to workflow concepts

- Convert the selected opportunities into workflow-specific concepts.
- Decide what stays in-system and what no longer requires Excel, Google, or external AI to complete.

## Go deeper in targeted research

- Focus future research on validating and expanding where the pattern is strongest
- Recommendation: Focus on decentralized environments and high-risk workflows.

Be sure to check out the Appendix that has detailed workflows, examples, and actionable insights.

# Appendix- Supporting Materials

## **Study Background & Details**

# Research approach

## Diary study

Enterprise HR admins documented their real-time workflows over multiple days using structured diary templates. Entries captured tool use, handoffs, workarounds, and points of friction as they occurred — not retrospectively.

8 participants

**DATA SOURCES**

- Structured diary entries (daily templates)
- Screenshot + annotation submissions
- Self-reported tool logs and friction points
- Retrospective debrief interviews

## Follow-up interviews

One-on-one interviews with diary participants to explore the ‘why’ behind observed behaviors — cost of workarounds, trust in the system, and the logic behind manual recovery work.

5 participants

**DATA SOURCES**

- Semi-structured interview transcripts
- Probed on specific diary entries
- Workflow walkthroughs + task narration
- Observed tool switching and exits

## Internal stakeholder interviews

Interviews with internal Paylocity stakeholders (implementation, support, services) to triangulate on systemic patterns, client exposure, and operational burden from a company-facing lens.

11 participants

**DATA SOURCES**

- Implementation team insights
- Client support escalation patterns
- Professional services field observations
- Internal system knowledge + PDR data

## Operational data (PDRs)

Product defect and escalation reports were reviewed to identify recurring structural pain in reporting, workflows, job codes, cost centers, and enterprise configuration.

**DATA SOURCES**

- Product Defect Reports (PDRs)
- Escalation + ticket trend analysis
- Recurring configuration failure patterns
- Cross-module impact mapping

# Who We Studied in Detail: Follow-up Interviews

Participants represent real enterprise HR operators across roles, systems, and operating models

## Ari

HR Business Partner  
GoldenHippo

### ENVIRONMENT

- Decentralized/Mixed
- Paycor (formerly UKG and Paycom)

### MANAGES

- Cross-functional HR workflows
- Employee lifecycle + business support

*Balances strategic HR support with operational system gaps across teams*

## William

HR Director of Equal Opportunity and Outreach  
University of Massachusetts – Lowell

### ENVIRONMENT

- Decentralized/mixed
- PeopleSoft

### MANAGES

- Compliance + reporting
- Cross-department coordination

*Manages complex workflows across multiple owners in a highly regulated environment*

## Ahmed

Payroll / HR Generalist  
Syntax Systems

### ENVIRONMENT

- Centralized
- ADP for payroll, SAP SuccessFactors for others

### MANAGES

- Payroll processing
- HR operations + data accuracy

*Ensures accuracy across systems through validation and correction*

## Cindy

Payroll / HR Specialist  
ROM-27

### ENVIRONMENT

- Decentralized/Mixed
- Paylocity

### MANAGES

- Payroll processing
- Data validation + compliance + error correction

*Receives input from non-experts and corrects errors under tight payroll timelines*

## Fabiola

HR Generalist – Employee Specialist  
ExtraSpace Storage

### ENVIRONMENT

- Centralized
- Workday

### MANAGES

- Onboarding + employee records
- Compliance workflows

*Handles high-volume workflows where small errors create recurring rework*

Across roles, systems, and operating models — all participants experience similar patterns: workflows require manual validation, coordination, and off-system work to be completed correctly.

# Enterprise HR Admin Personas

*How workflow burden changes by operating model*

## Centralized Enterprise HR Admin

### SNAPSHOT

- Work handled by trained HR professionals
- Central team owns most workflows
- Stronger process control across systems

### HOW WORK GETS DONE

- Work starts in the system — but doesn't end there
- Admins leave to validate, compare, and confirm
- Excel and external tools are structural parts of the workflow

### WHERE COMPLEXITY SHOWS UP

- Trust gaps in system outputs
- Manual validation and reconciliation
- Field-access and reporting limitations

*"I can't act on this until I verify it myself."*

### PRODUCT IMPLICATION

- Increase trust in outputs
- Reduce validation workload
- Improve in-system comparison and confidence signals

## Decentralized Enterprise HR Admin

### SNAPSHOT

- Work distributed across managers and local teams
- Non-expert users enter critical data
- HR owns downstream risk and cleanup

### HOW WORK GETS DONE

- Work starts with non-experts entering data
- System accepts input without enough guardrails
- Errors carry forward — HR catches them later

### WHERE COMPLEXITY SHOWS UP

- Upstream errors at point of entry
- Downstream payroll and compliance cleanup
- Heavy coordination across locations and systems

*"I'm fixing problems I didn't create — and I'm accountable."*

### PRODUCT IMPLICATION

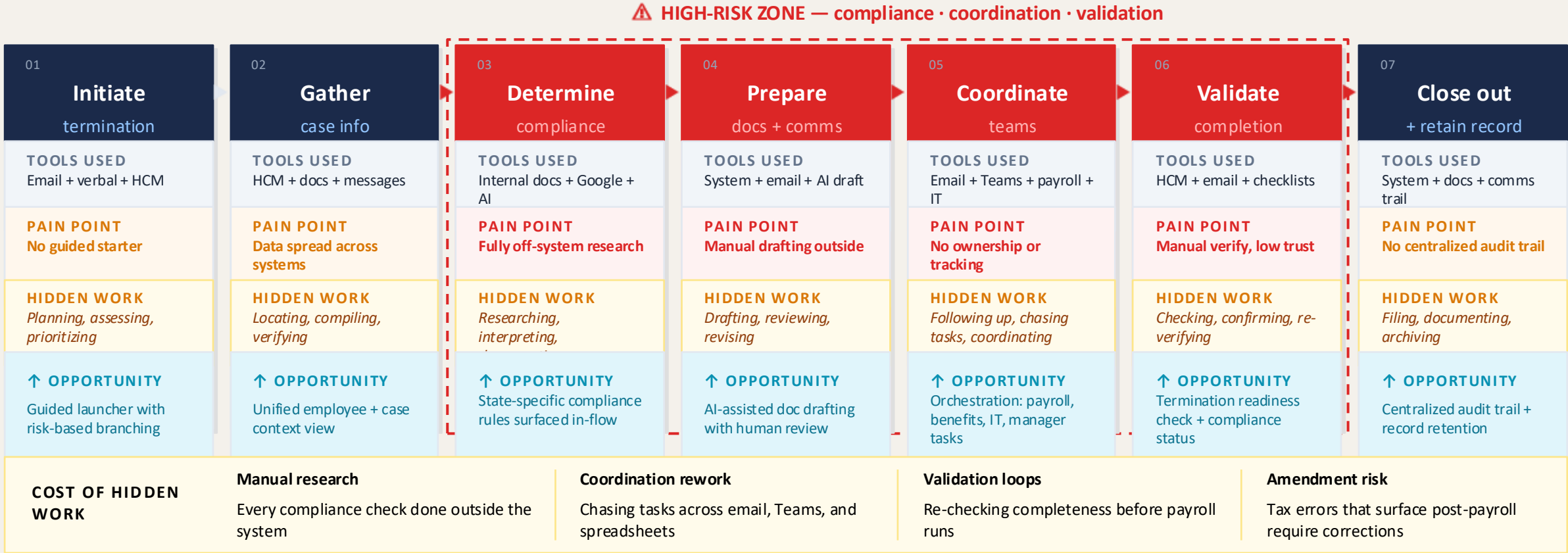
- Add guardrails at point of entry
- Detect issues earlier in the workflow
- Reduce HR dependency on cleanup and recovery

Both personas leave the system — but for different reasons. Centralized admins leave to validate. Decentralized admins leave to fix and recover.

## **Detailed Workflows & Opportunities**

# Termination is a seven-step compliance event. The system handles only one of them.

Where the hidden work actually lives and the costs associated with it

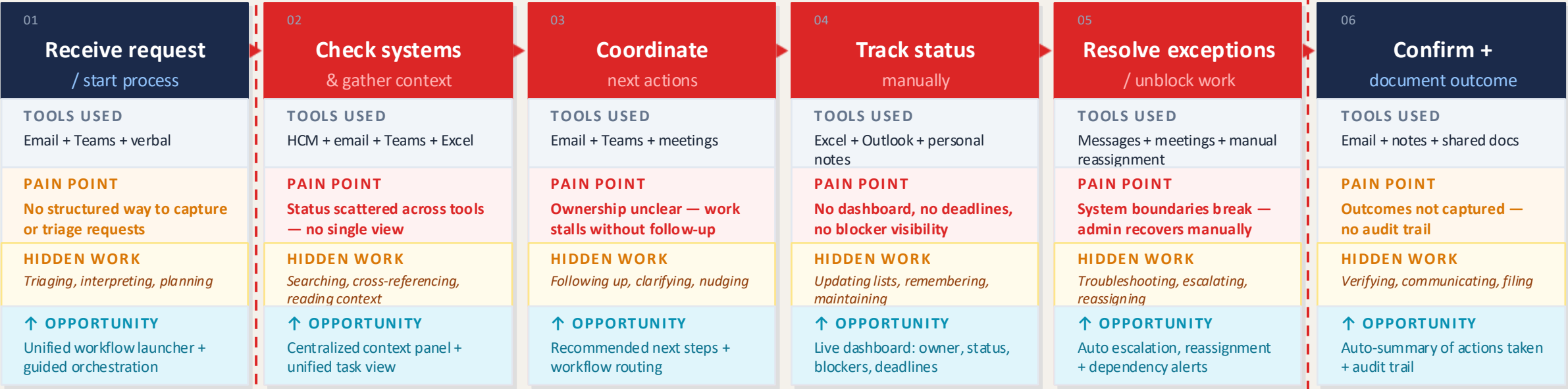


The strongest opportunity is reducing the manual compliance and coordination work required to complete the workflow correctly.

# Coordination + Workflow Orchestration

Where keeping work moving becomes invisible labor — and where it stalls

**⚠ HIGH-RISK ZONE — coordination · ownership gaps · status tracking**



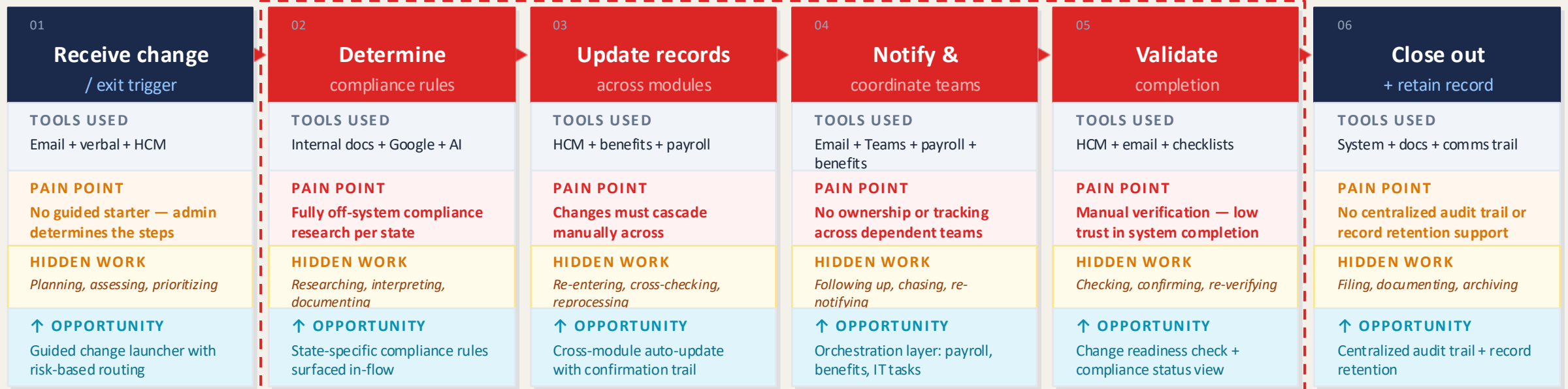
<b>COST OF HIDDEN WORK</b>	<b>Follow-up overhead</b> Admins manually chase every handoff across Teams, email, and meetings	<b>Status tracking time</b> No dashboard means rebuilding status from scratch each check-in	<b>Escalation delays</b> Unresolved blockers stall payroll, onboarding, and compliance tasks	<b>Lost audit history</b> Completions and decisions are undocumented when work ends
----------------------------	--	--	---	--

*The opportunity is to shift this from manual coordination and invisible work to system-supported orchestration and visibility.*

# Change of Status + Benefits Exit

Where compliance gaps, coordination failures, and trust breakdowns concentrate

⚠ HIGH-RISK ZONE — compliance · benefits · multi-system coordination



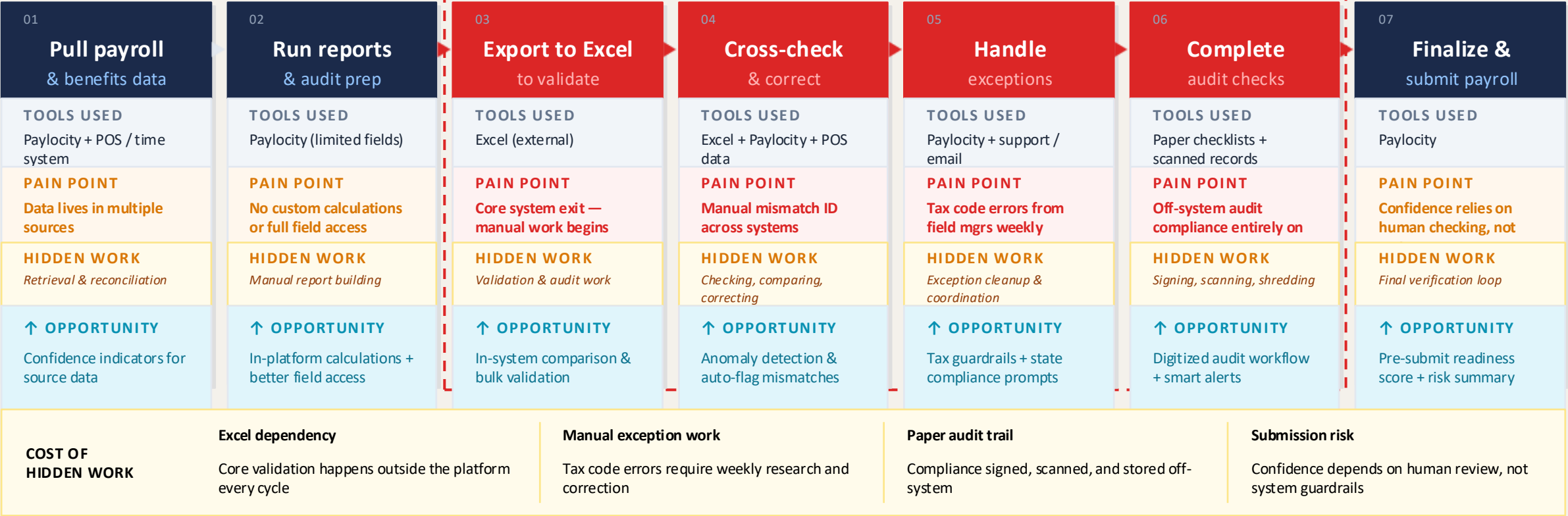
<b>COST OF HIDDEN WORK</b>	<b>Off-system compliance</b> Every status change requires manual research on rules and obligations	<b>Multi-module rework</b> Changes cascade manually — any missed update affects payroll or benefits	<b>Coordination overhead</b> No ownership model means HR chases completion across teams	<b>Audit trail gaps</b> Incomplete records create compliance risk when changes are audited
----------------------------	---	--	--	---

Every status change is a compliance event — the system must guide the process, not just record the outcome.

# Admins don't trust payroll outputs until they validate them manually in Excel — every cycle.

Where the hidden validation, reconciliation, and audit work actually lives

**⚠ HIGH-RISK ZONE — validation · reconciliation · exception handling**

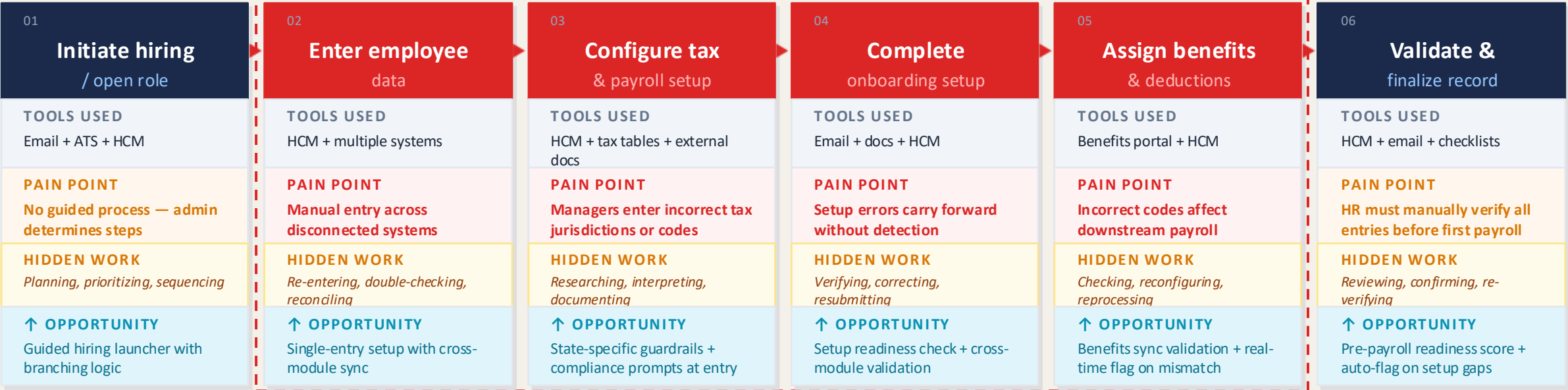


The clearest opportunities are the points where users leave Paylocity to validate, reconcile, or recover from missing workflow support.

# Setup errors enter silently and surface as payroll problems. The system should stop them at entry.

Where setup errors are introduced — and how they travel through the system

**⚠ HIGH-RISK ZONE — data entry · configuration · setup errors**



<b>COST OF HIDDEN WORK</b>	<b>Incorrect tax setup</b>	<b>Manual re-entry</b>	<b>Downstream correction</b>	<b>HR verification burden</b>
	Wrong jurisdiction codes created during onboarding — require amendment	Same data entered across multiple systems with no sync	Setup errors surface at payroll or compliance — costly to fix late	HR manually reviews all new records before first payroll run

Errors introduced at setup are the most expensive to fix — the system must catch them before they carry forward.

## **Additional Workflow Details**

[Link to Proposed Workflow Changes](#)

# Additional workflow details

## Onboarding / tax-code setup + I-9 issues

*Cindy + internal stakeholders*

Recurring tax jurisdiction errors when field managers enter incorrect codes — leading to state tax account problems, amendments, penalties, and interest. I-9 and employee setup issues add further administrative burden during onboarding.

↑ Tax code guardrails, state-aware prompts, onboarding readiness score

## Promotions / compensation / surveys / documentation

*Ari + internal stakeholders*

Promotion and compensation workflows require coordination across managers, HR, and payroll — with significant manual documentation and communication burden. Survey administration and performance documentation add further invisible coordination overhead.

↑ Guided compensation workflows, automated routing, document templates

## Org design / job codes / cost-center structure / classification

*William + PDRs + operational docs*

Job code and cost-center mismatches are a recurring source of PDR escalations. Org redesign events create cascading data corrections across modules. Classification and structure issues ripple into reporting, payroll, and compliance.

↑ Cascading update automation, cross-module validation, org change workflow support

## Mentorship / knowledge transfer / note-taking burden

*Fabiola (cognitive-load example)*

HR admins carry significant undocumented knowledge about how to navigate system limitations, workarounds, and client-specific configurations. Knowledge transfer is manual and fragile, creating institutional risk when roles change.

↑ AI note-taking, searchable workflow documentation, onboarding guides

# Supporting operational and vertical evidence

These sources reinforce that the patterns surfaced in research reflect systemic, operational, and client-facing issues — not isolated observations.

## PDR and operational data highlights

- Recurring escalations in reporting, workflows, job codes, and cost centers
- Cost center cascading errors requiring manual remediation across records
- Payroll and data quality PDRs reflect enterprise-scale configuration gaps

## California compliance

Multi-state complexity + CA-specific payroll and labor law requirements create disproportionate admin burden for clients with CA-heavy employee populations.

## Diocese / nonprofit

Centralized HR with highly distributed locations. Tax setup, payroll structure, and reporting span entities with inconsistent data ownership.

## Sports / hospitality

High turnover, seasonal workforce, and POS-dependent time data create recurring validation and reconciliation burden for HR admins.

## Restaurant / franchise

Multi-location, multi-entity structures with variable pay rules and high-frequency onboarding and termination events.

## **AI Opportunity & Investment Areas**

# AI / automation signal inventory

Explicit signals from participants and stakeholders, clustered by type of intervention requested.

## AI assistance

- Natural language reporting — query data without knowing field names
- Compliance guidance surfaced in-context (state rules, deadlines)
- Communication drafting with human review (termination letters, notices)
- Summarization of workflow status, meeting notes, and task history
- Anomaly explanation — not just flagging, but explaining what changed and why
- Suggested next steps in ambiguous workflows

## Automation

- Auto-validation rules on payroll submission (pre-submit checks)
- Tax code guardrails — restrict entry of invalid or high-risk codes
- Cross-module data transfer alerts when setup is incomplete
- Workflow routing and escalation when steps go unacknowledged
- Automated audit trail and checklist completion tracking
- State-specific compliance triggers based on employee location / event type

## Better tooling

- In-system report filtering, grouping, and custom calculations
- Unified employee / case context view across modules
- Centralized workflow status dashboard (owner, deadline, blocker)
- Editable, self-service dashboards for common admin reporting needs
- Digitized audit checklist with completion status + sign-off tracking
- Confidence indicators on source data (e.g., is this payroll data current?)

# WHERE AI & AUTOMATION CAN REDUCE WORKFLOW BURDEN

Opportunities appear consistently at the points where admins leave the system to validate, interpret, or coordinate work.

	Data & Validation	Analysis & Reporting	Setup & Change	Coordination & Orchestration
Current state	Manual validation across systems + Excel	Export to Excel, pivot & format manually	Manual entry, no guardrails or alerts	Track via email, Teams & personal notes
Automation	Auto-validation rules + anomaly detection	Auto-refresh reports, prebuilt calculations	Tax code guardrails, rule-based error blocks	Workflow routing, alerts + auto-escalation
AI-assisted	Anomaly explanation + suggested corrections	Natural language reporting + NL queries	State compliance guidance in-flow	Summarize status, draft communications
Outcome	Less manual checking, more trust in data	Reduced system exits, faster analysis	Fewer downstream errors + amendments	Less invisible work, workflow stays in-system

The goal is not more features — it is reducing the hidden effort required to complete workflows correctly.

# WHERE WORK BREAKS — AND WHERE AI / AUTOMATION CAN INTERVENE

Forward Together.

## Payroll & Validation Trust gaps + validation burden

<b>Pull payroll data</b> Paylocity + POS Source data not trusted	<b>Run audit reports</b> Paylocity Reporting limits	<b>Export to Excel</b> Excel ↳ Exits HCM Manual comparison	<b>Cross-check &amp; validate</b> Excel + Paylocity Row-by-row validation	<b>Resolve exceptions</b> Paylocity + support Tax errors → manual cleanup	<b>Audit / compliance</b> Paper + Paylocity Paper-based audit work
Confidence indicators	In-platform calculations	In-system audit tools	Anomaly detection	Tax code guardrails	Digitized checklist

## Reporting & Compliance System exits + lack of flexibility

<b>Pull report</b> HCM Not flexible for filtering	<b>Export to Excel</b> Excel ↳ Exits HCM Core system exit	<b>Analyze &amp; clean</b> Excel + HCM Row-by-row manual prep	<b>Cross-ref other data</b> Excel + teams Incomplete data, manual	<b>Research compliance</b> Google + AI tools ↳ Exits HCM Knowledge not in workflow	<b>Build output</b> Excel / docs Manual narrative
NL report requests	In-platform analytics	Auto insights + anomaly	AI-assisted reconcile	Embedded compliance	AI narrative + support

## Onboarding & Setup Error propagation + module fragmentation

<b>Begin onboarding</b> Paylocity No guided starter	<b>Enter employee info</b> Paylocity No validation at input	<b>Configure tax / state</b> Tax module Wrong codes from field mgrs	<b>Configure time / payroll</b> General modules Feels like multiple systems	<b>Verify data flow</b> HCM + email Notification gaps	<b>Resolve errors</b> HCM + support Tax errors → penalties
Guided launcher	Smart field validation	Tax guardrails + state rules	Unified config flow	Cross-module validation	Readiness score

## Termination Compliance + coordination + cross-team dependencies

<b>Initiate termination</b> Email / HCM No guided starter	<b>Determine compliance</b> Google + docs ↳ Exits HCM Rules not in workflow	<b>Prepare docs / comms</b> email Sensitive, error risk	<b>Coordinate teams</b> Email + Teams + IT Handoffs, no tracking	<b>Validate completion</b> HCM + checklists Manual verify, low trust	<b>Close out &amp; retain</b> Docs + trail No audit trail
Guided launcher	State rules in-flow	AI drafting + review	Task orchestration	Readiness check	Audit trail + records

Workflow step

Pain / breakdown

System exit

AI / automation opportunity