RESEARCH CENTRE • PRACTICAL GUIDE

The HR Admin Fix Guide

Reducing HR admin load by fixing the work before adding tools

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Who this guide is for

This guide is written for lean HR teams and HR leaders in scaling organisations, typically 200 to 1,000 people, whose teams spend more time on repetitive admin than on the work they were hired to do. If every week brings the same avoidable questions, the same repeated data entry and the same chasing, this guide gives you a practical way to reduce that load. It shows you how to identify friction, find its root cause, fix the work itself, and only then decide whether a system change or automation is worth the effort.

What you will find inside

- The Admin Fix method: five steps from friction to fixed work
- A triage framework for every admin task you find
- A 30-minute admin friction inventory worksheet
- A worked diagnosis walkthrough, clearly labelled as an illustrative example
- Data and system checks that catch problems early
- A 30-day action plan and a measures worksheet
- The safe automation and AI gate
- A one-page checklist to keep on the wall

The Admin Fix method

The method follows one principle: fix the work first. Admin load grows when tasks repeat without anyone examining why. The five steps below can be run on one task at a time, in a few hours per task, using tools you already have.

Step 1 – Identify repeat friction

List the admin tasks that recur every week or every month. Look for tasks with high volume, several handoffs, rework, or chasing. Ask the team what they redo most often and where deadlines get tight.

Step 2 – Map the real work

Document the task as it actually happens, not as the process document describes it. Note who touches it, in what order, with what system, and where it waits. A simple table is enough at this stage.

Step 3 – Find the root cause

For each pain point ask why until you reach something you can change: unclear ownership, a missing field, an unspoken rule, a duplicate record, or a manual step nobody owns. Stop at the first cause you can act on.

Step 4 – Redesign and implement

Apply the triage framework on page 3. Remove what can be removed, simplify what remains, name an owner for every step, configure the system you already own, and only then consider automation.

Step 5 – Measure and govern

Agree a small set of measures, set a review date, and make one person responsible for keeping the fix alive. A fix without an owner quietly reverts.

Illustrative example, not a client fact. A payroll cut-off week triggers a burst of manual chasing for missing timesheets. Mapping the real work shows the reminder is sent to everyone rather than only those with gaps. Narrowing the reminder and naming an owner for follow-up removes most of the chasing without any system change.

The triage framework

Work through the six options in order. The earlier options remove work outright; the later ones spend money or add tools. Most teams jump straight to automating a task that should have been eliminated.

1. Eliminate	Stop the task. Ask what breaks if nobody does it for one month. Often nothing does, or a cheaper control covers the risk.
2. Simplify	Shorten the task. Fewer fields, fewer approvals, fewer steps, one form instead of three emails.
3. Clarify ownership	Name one person accountable for each step and for the whole task. Shared ownership is a common root cause of chasing.
4. Configure the current system	Use features you already pay for: required fields, workflows, templates, self-service, notifications. No new purchase.
5. Connect data	Remove duplicate entry by making one system the source of truth and linking others to it.
6. Automate only stable work	Automate a task only after it has run the same way, reliably, for a defined period with named ownership and clean data.

Illustrative example, not a client fact. A monthly headcount report is rebuilt by hand from three exports. Under the triage order, the report is first checked for who actually reads it, then reduced to the fields those readers use, then sourced from one system of record rather than three. Automation is considered only if the report is still needed afterwards.

30-minute admin friction inventory

Set a timer for 30 minutes. List the recurring admin tasks your team touches most often. Leave the volume column blank for now if you do not know it; you can estimate later or check system logs.

Task	Trigger	Volume	Handoffs	Rework	Owner	System	Risk	Evidence

Column notes

- Task: what the team actually does, in plain words.
- Trigger: what starts the task, such as a date, a request, or a system event.
- Volume: how often per week or month. Blank is fine; estimate later.
- Handoffs: how many people or teams touch it before it is done.
- Rework: how often it is redone or corrected.
- Owner: who is accountable. Leave blank if nobody is; that is a finding.
- System: which tool holds the record. More than one is a finding.
- Risk: what goes wrong when this fails, such as payroll or compliance.
- Evidence: how you know, such as emails, tickets, or system logs.

Workflow diagnosis walkthrough

This walkthrough is an illustrative scenario for a common HR workflow, an employee change such as a promotion or title update. It is not a client case study. Use the same six steps on any workflow you choose.

1. Current state

Write down what actually happens today. In this illustrative scenario, a manager emails HR, HR checks the current record in the HR system, updates a spreadsheet, notifies payroll by email, and asks IT to change system access by chat message. Nobody tracks the request between steps.

2. Pain points

Mark where work waits, repeats or errors. In this illustrative scenario, the request sits unread in a shared inbox for days, the same details are typed into three places, and payroll sometimes learns of a change after the effective date.

3. Target state

Describe the outcome you want, not the tool. Here the target is: one request, one record, visible status, and payroll informed before the effective date. Keep it to one or two sentences.

4. Tests

Try the smallest version first with two or three real requests. Does the request reach the right person first time? Does the record update once? Can anyone see where a request sits without asking?

5. Launch

Roll out with a short note explaining what changed and who owns what. Give the first two weeks extra attention; that is when old habits return.

6. Owners

Name a process owner, a data owner and a system owner. A workflow without named owners drifts back to the old path within a quarter.

Illustrative example, not a client fact. The scenario above is drawn from a common pattern in growing organisations, not from a specific client. Your own workflow will differ in detail, and the six steps still apply.

Data and system checks

Before automating anything, run these eight checks against the workflow you are fixing. Each check is a question with a clear pass or a clear gap.

Source of truth	Is there one system where each type of people data is definitively held, and does everyone know which one it is?
Duplicate entry	Is the same detail typed into more than one system? Every duplicate entry is a future error.
Required fields	Are mandatory fields enforced at entry, or corrected later by an HR administrator?
Role-based permissions	Can people only see and change what their role requires? Broad access is a data risk and a source of untracked edits.
Integrations	Do connected systems pass data automatically where the flow is stable, or does someone copy it across?
Audit trail	Can you see who changed a record, when, and what changed?
Exception handling	When the normal path fails, is there a named fallback and does anyone record how often it is used?
Data portability	Could you export the data in a usable form if you changed systems? Closed data is a long-term cost.

Any check that fails is not a reason to buy a tool. It is a reason to fix the work and the data first. Tools sit on top of foundations; they do not replace them.

Prioritisation and a 30-day action plan

Score each fix on two questions: how much repeated effort it removes, and how much risk it reduces. Start with fixes that score on both. The plan below is a pattern, not a schedule with promised outcomes; your own timings will depend on the fixes you choose.

Week 1	Run the friction inventory. Pick two or three tasks. Map the current state of the highest-priority task.
Week 2	Find root causes for that task. Agree the target state and the fix with the people who do the work.
Week 3	Implement the fix, configure the current system where needed, and update the written process. Name owners.
Week 4	Test with real work, adjust, agree measures and review dates, and start the cycle again on the next task.

Keep the plan visible. A one-line summary per week, reviewed at the team's usual stand-up or team meeting, is enough.

Measures worksheet

Agree a small number of measures, each with a baseline, a direction of travel, a data source and an owner. Keep capacity released and cash savings separate: they are different claims and mixing them weakens both.

Measure	Baseline	Desired direction	Data source	Owner	Review date

Choosing measures worth tracking

- Capacity released: hours per week returned to higher-value work. Track it from the task level, not from a broad estimate.
- Service quality: how long a request takes from start to finish, and how often it is right first time.
- Rework rate: how often a task must be corrected or repeated.
- Data quality: completeness of mandatory fields, or the number of duplicate records found in a review sample.
- Cash savings: track separately, and only where a real cost line changes, such as a licence or an agency spend.

This guide makes no promised savings. Whatever baseline you record is the only honest starting point for your own comparison.

The safe automation and AI gate

Copieux Group's approach is to fix the work before adding tools. Before any automation or AI is applied to an HR task, all five statements below should be true. If one is false, fix that first.

☐ The process is stable: it has run the same way, reliably, for a defined period.

☐ An owner is named for the process, the data and the tool.

☐ Data quality is fit for purpose: required fields enforced, duplicates resolved, source of truth agreed.

☐ Permissions and human review are in place: role-based access limits who and what the automation can touch, and a person reviews outputs before they take effect.

☐ Exceptions are handled: there is a named fallback path, and someone records how often it is used.

This gate protects the team as much as the organisation. Automation on top of unstable work amplifies the errors it was meant to remove.

One-page checklist

Work down the list. Each unticked box is your next conversation.

☐ Friction inventory completed for the team's most repeated tasks.

☐ Current state of the priority workflow mapped as it really happens.

☐ Root cause agreed, not assumed, for each pain point.

☐ Triage order applied: eliminate, simplify, clarify ownership, configure, connect, then automate.

☐ Every step has a named owner.

☐ The eight data and system checks run, and gaps listed.

☐ Required fields enforced at the point of entry.

☐ Role-based permissions reviewed for the systems involved.

☐ Source of truth agreed and duplicate entry reduced.

☐ Measures chosen, baselines recorded, review dates set.

☐ Capacity released tracked separately from any cash savings.

☐ Automation and AI held at the gate until all five statements are true.

Take the next step

Complete the Work Design Readiness Assessment to see where your HR function stands and which foundations to strengthen first. It takes about ten minutes.

copieuxgroup.com/assessment

If you want a deeper, structured review of your workflows, data and systems, consider the paid Work Design Diagnostic. Details and booking are at:

copieuxgroup.com/work-design-diagnostic

Copieux Group is a UK HR work design and HR systems consultancy that gives HR teams at 200 to 1,000-person companies a day a week back by fixing the work first.