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How Plum unified and automated HR processes with Keka



Introduction

Plum, founded in 2019, set out to revolutionize employee care by simplifying health benefits for organizations. What started as a closely-knit unit quickly evolved into a vibrant workforce of over 150 passionate individuals.

However, this meteoric rise presented a challenge for the HR team, especially while navigating the complexities of managing data for a rapidly expanding workforce.

Industry - Finance/BFSI

Employees - 300+

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Leadership evaluates existing process for an overhaul

Foreseeing future challenges and needs, the organization's leadership did a complete evaluation of their current processes and identified the following challenges:

- Manual target-based payouts on Excel became complex with team expansion
- Manual data-feeding became a daunting task as the headcount grew
- Managers bore the burden of leave tracking, often resulting in fragmented data
- Diverse payroll variables required data consolidation from numerous Excel sheets
- Manual payroll calculations caused delays and errors, risking timely salary disbursals
- Approving expenses while ensuring compliance with policies was a harrowing experience

Facing these hurdles, Lincy Kurian, Plum's People Success Manager and the Head HR, began looking for an HRMS solution that suited their specific requirements. After evaluating several systems, they found the perfect match in Keka as it fulfilled their needs through cost-effective offerings.

The first step - refining leave tracking

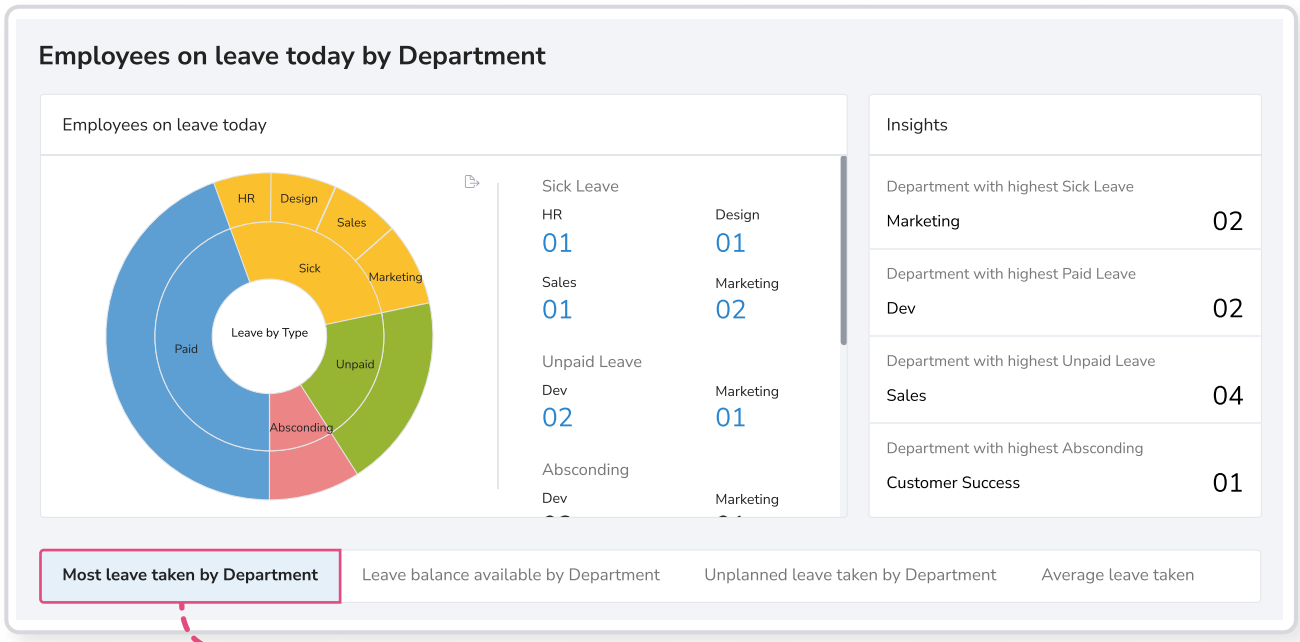
As Plum grew, handling leave data for a flourishing team became a daily struggle. HRs grappled with various issues in leave management, such as:

- Managing different leave types (relocation, birthday etc.) became tricky
- Time-consuming policy checks made leave approval cumbersome

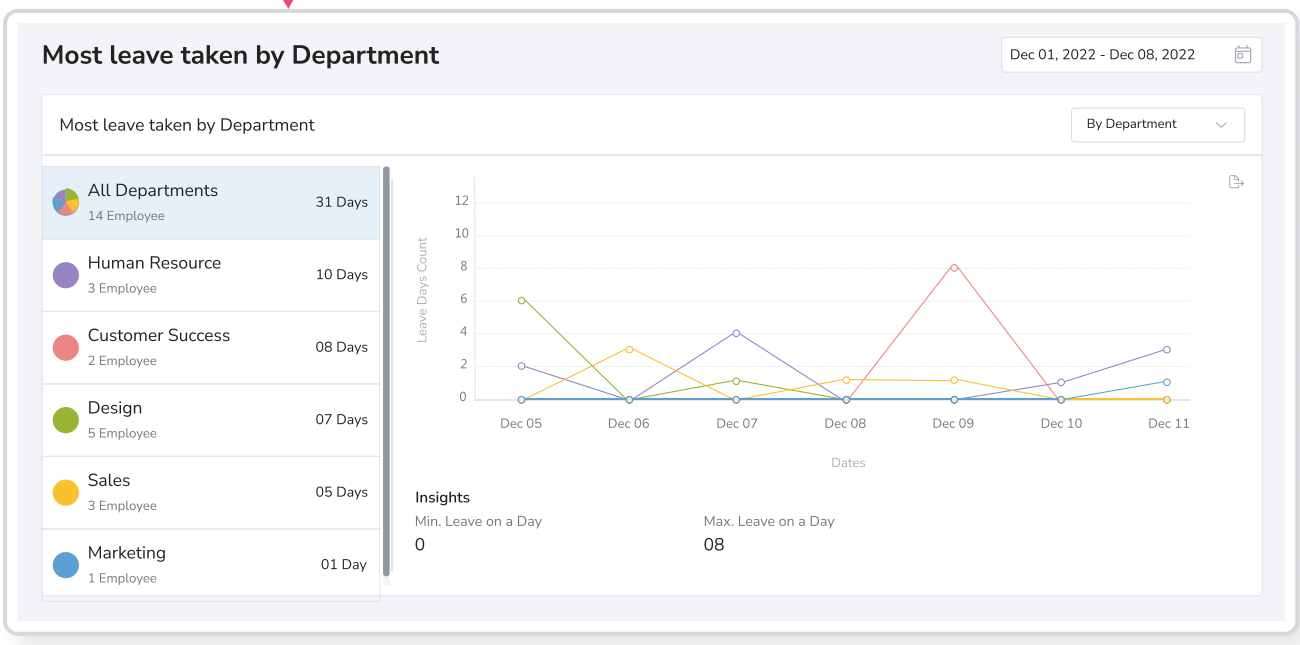
Keka automated the entire process of leave tracking and management. It introduced:

- Simplified and seamless leave applications and tracking, supported via mobile app
- Flexibility to categorize leave by employee or department, with other customizations
- Instant notifications to keep stakeholders informed of leave applications
- Keka streamlined communication, replacing the need for checking *Slack* and providing a real-time view of who was on leave

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Representative screen and data





Lincy Kurian
Manager, People Success

As we are a wellness organization, we ask our employees to take leave and plan them in advance to maintain their well-being. With Keka, this process has been streamlined and simplified

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Automated payroll calculations, lightening HR's burden

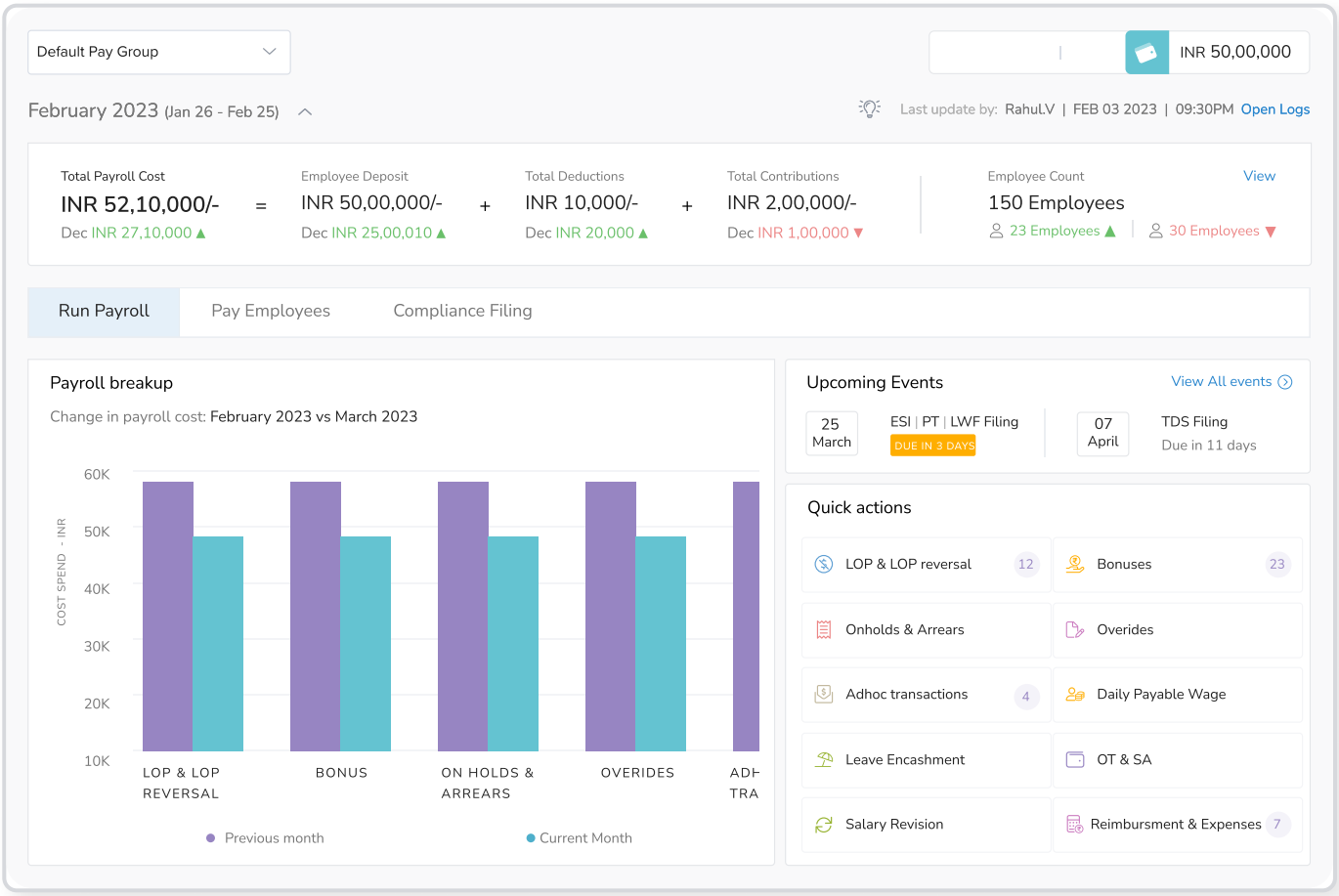
"There were many variables and overheads such as additional payouts, deductions etc. due to which payroll was complicated for us at Plum," said Lincy, outlining their payroll dilemma.

- Dealing with payroll variables for each employee proved laborious without automation
- Specialized departments, like Customer Success, required accurate payroll categorization for over-time work
- Manually managing diverse incentives and target-based benefits made month-ends very chaotic

Keka turned the tough job of managing payroll into a simple and efficient process:

- A single dashboard offered a clear overview of deductions and payment variables, enhancing visibility
- Automated calculations based on incentives and policies reduced payroll processing time significantly
- Keka established an error-free payroll process, ensuring timely salary disbursal

Representative screen and data



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Streamlining expense policy compliance through easy approvals

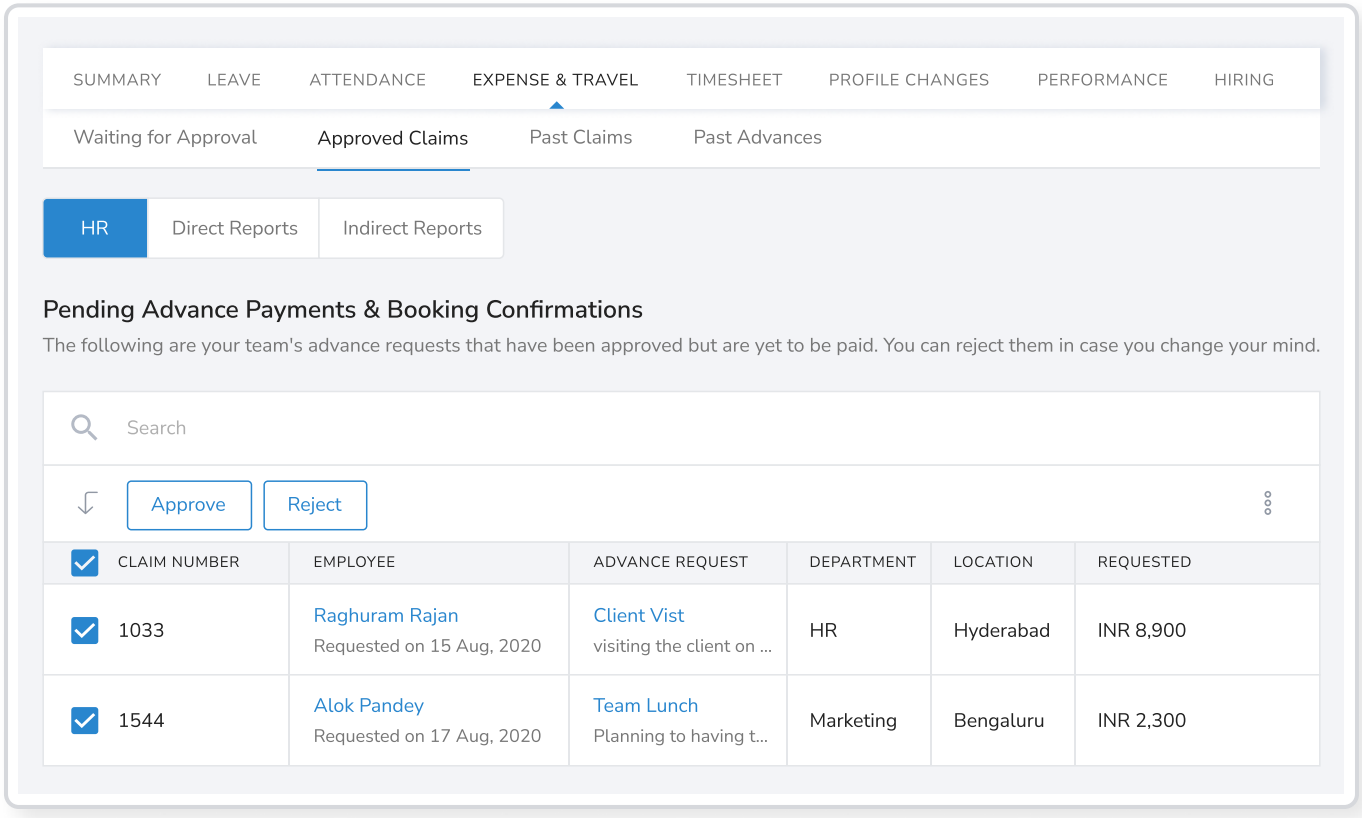
Due to the multiple checks in approval process, Lincy had a hard time managing expenses, often leading to complications, prompting a need for a simpler solution:

- Due to the volume of expense claims, the HR had to spend additional time to clear the approval backlog
- Manually managing frequent and ad-hoc expense claims made prioritization difficult
- While it was important to ensure policy compliance, the burden fell on HR to manually check each claim and ensure compliance

Keka introduced an expense management system where claims were effortlessly submitted by employees, and approvals became a breeze for managers and HR:

- Stakeholders were informed through automated notifications for one-click approvals
- The system flagged policy violations automatically, empowering managers to take necessary steps
- Keka also tracked expense limit breaches, enabling managers to intervene as needed
- The simple and easy process improved the overall employee experience due to timely approvals

Representative screen and data



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Lincy Kurian
Manager, People Success

> **Keka makes us feel more in control in terms of defining the policies and making sure that they are being followed by everyone in the organization.**

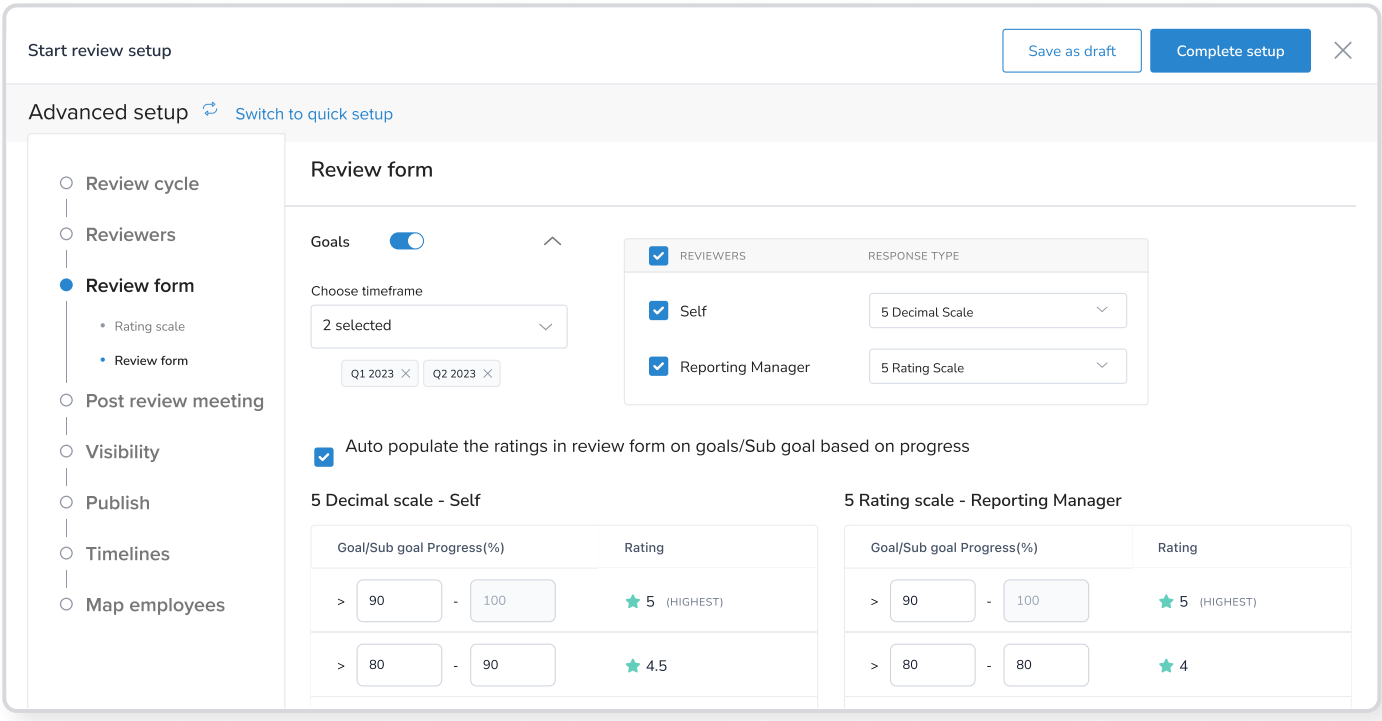
A reliable tool for performance management

At Plum, the performance management process was continuously revamped to keep abreast of employee expectations and industry best practices. It wasn't just a routine but a way for employees to learn more about themselves.

Previously, this performance evaluation was carried out on a different platform as their existing software did not have the functionality.

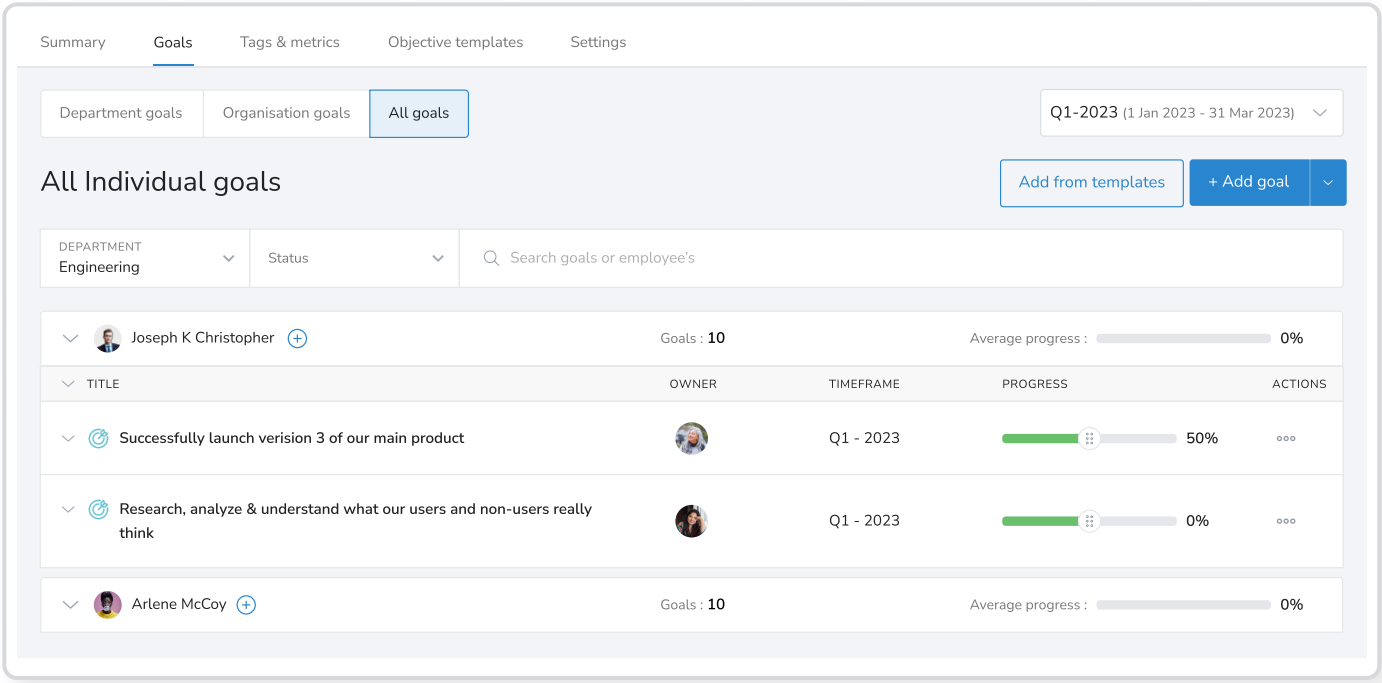
But with Keka, performance management was simplified and unified on a single platform:

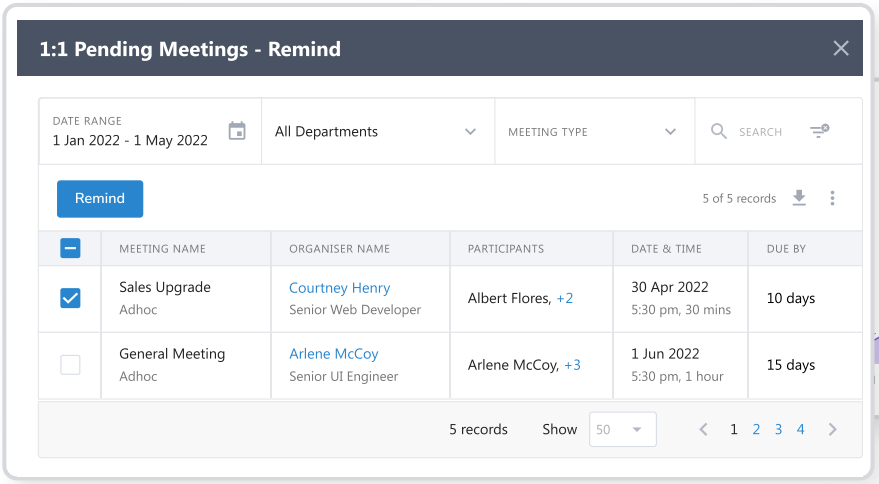
- Having various review options allowed them to set goals according to their requirements
- The flexible ratings system enabled the organization to shift from basic industry norms to a more personalized approach based on their own needs and values



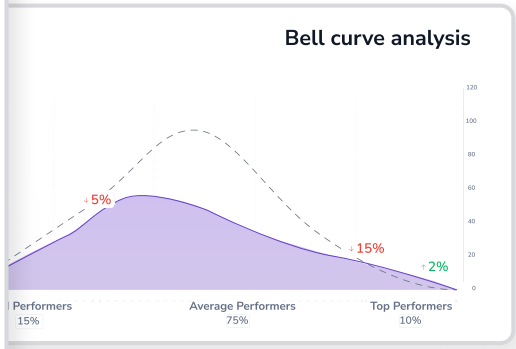
Representative screen and data

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Representative screen and data



Sustaining a great employee experience

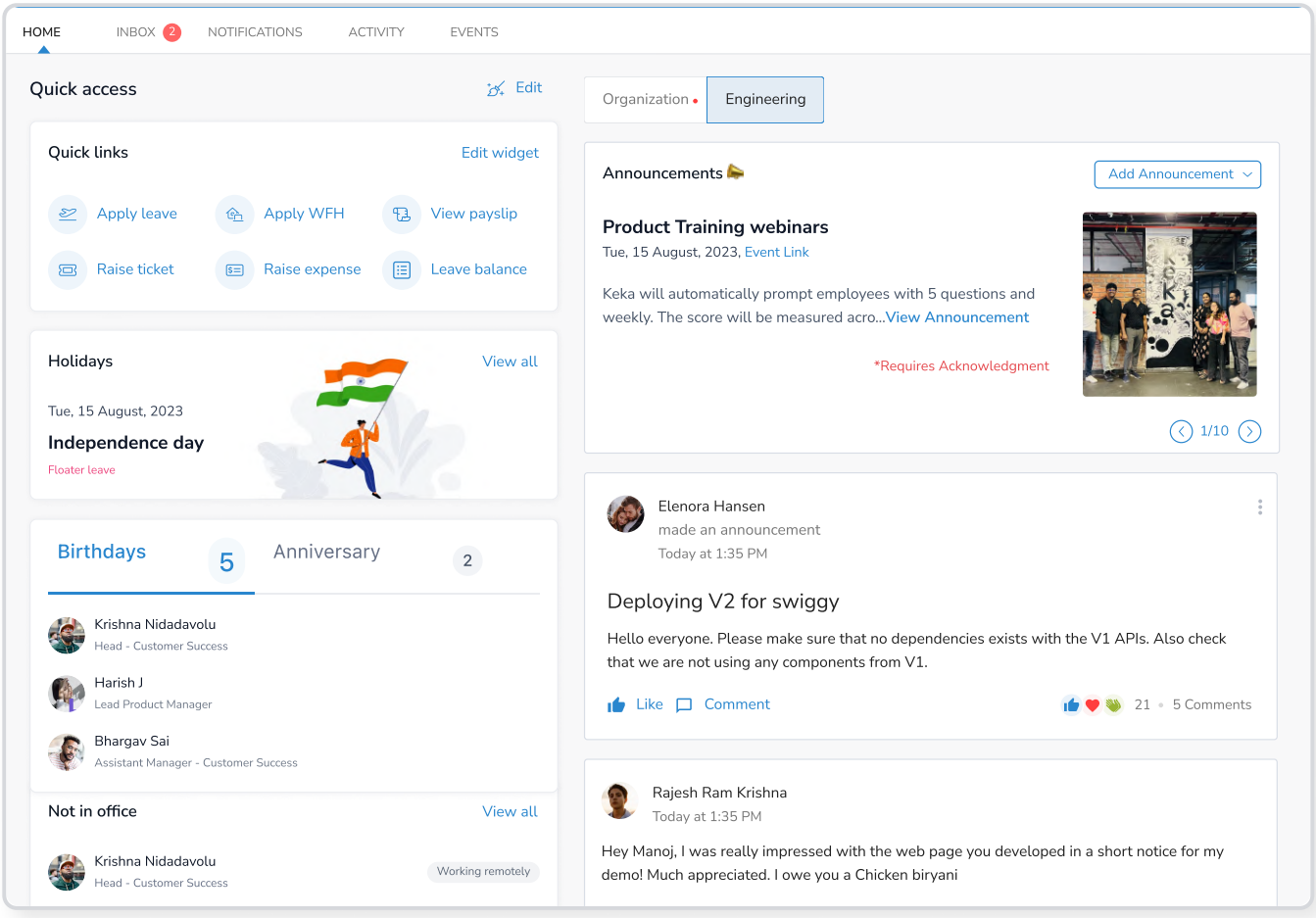
Even as they grew steadily, Plum made sure that the culture they had built and the experience they delivered to employees was continuously improved. For this, they now needed an employee experience platform that could help them sustain their EX-initiatives. With a growing headcount, they had begun to face several challenges.

- Lack of communication transparency led to vital information being missed by employees
- Communication was mainly dependent on messaging platforms, resulting in employees not being able to access it without scrolling
- New joiners faced challenges finding documents and policies without easy access
- Miscommunication with stakeholders created bigger issues, requiring time-consuming resolutions

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With the help of Keka, the employee experience improved:

- The Announcement feature kept employees informed about new policies or changes
- Policies were easily accessible, allowing new joiners to review information at their own pace
- The Social Wall fostered a culture of mutual recognition as employees praised and celebrated each other's achievements
- As a single, centralized platform, Keka streamlined access, eliminating the need to log in to multiple platforms
- Keka facilitated seamless document retrieval and provided easy access to payslips, leave balances, and other details for employees



Representative screen and data



Lincy Kurian
Manager, People Success

Having one space for everything is a big help for all of us as we don't have to login to 20 different platforms to get relevant information.

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Lincy Kurian

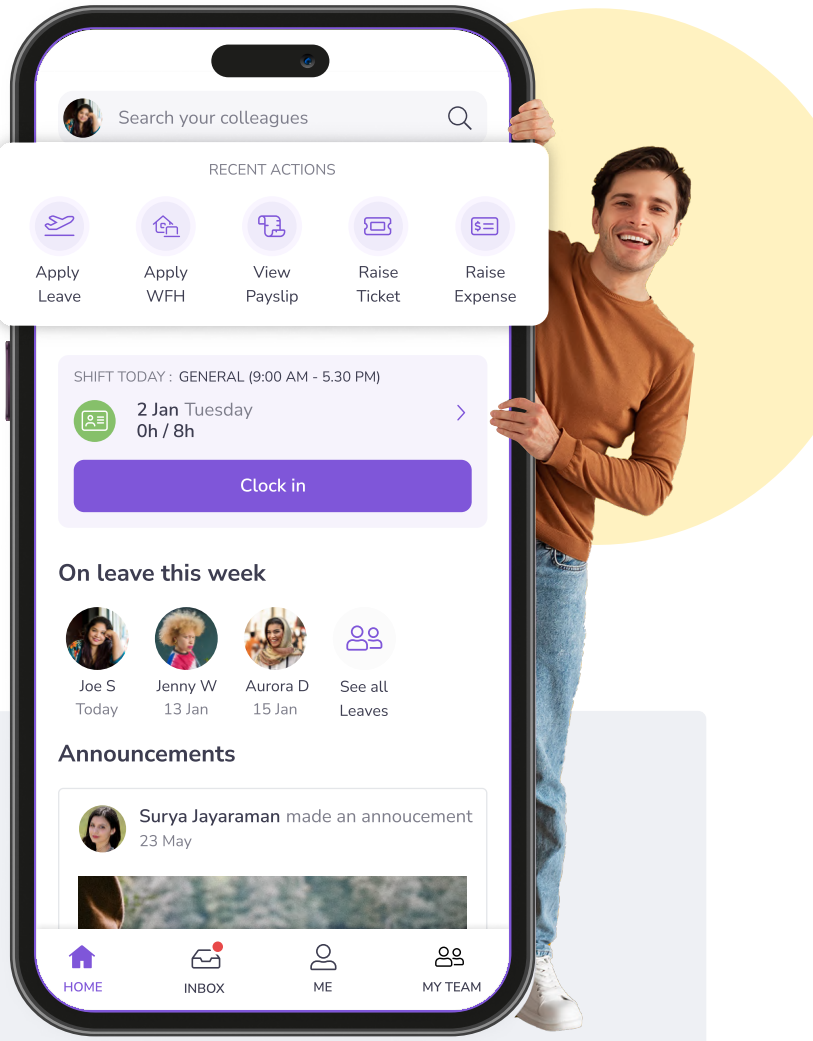
Advice for HRs

"Other organizations and startups should aim at switching to an HRMS once they cross the 100 employees mark. They should be more understanding towards the pain of their HRs in handling several data sheets. Having a one-stop solution is an important fix, which is where I feel tools like Keka can be a life saver."

About Keka

Everything you need to build a great company

Keka is your people enabler. From automation of people processes to creating an engaged and driven culture, Keka is all you need to build a good to great company.



Reach out to us!

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