



charlie.

# Small Business, Big decisions

Do you need HR software?

Discover when's the right time to invest in HR software, whether you have 2 or 50 team members



**1.** Is HR software right for you?



**2.** Saving time with HR software



**3.** Successful HR without an HR team



**4.** Staying compliant



**5.** Attract and retain on a modest budget



**6.** Spend money where it matters



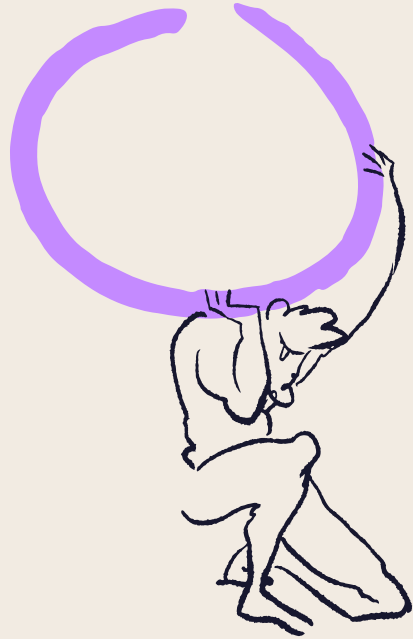
**7.** Is it really time to invest in HR software?





# 1.

Is HR software  
right for you?



Effective HR management is vital for small businesses: it provides the foundation your company needs from day one, through growth and beyond. **Whether you have 2 or 50 team members, getting HR on the right track from the start will help your business overcome challenges, big or small, and thrive as it grows.**

But how do you commit to HR when you've got no time nor expertise? There are a few obstacles standing in your way:

- **You're in charge of HR, but it's not your job title**, so you have little time to dedicate to it alongside your main responsibilities.
- **You don't have the headspace** to maintain very high standards for HR, and instead have to settle for more "scrappy" processes.
- **You'd like to unload some of the admin off your plate** so you can focus on more impactful areas of the business.
- **You don't feel confident you have the knowledge to be "in charge" of HR**, so you'd rather find a reliable and compliant solution to deal with it.
- **You feel like spreadsheets, emails, and manual processes are not the ideal solution** as they make you feel and look very disorganised.

Although this is a common situation for small businesses to be in, it's not an excuse to disregard HR. If you deliberately choose to invest in sales, marketing, product development, and other areas of the business while neglecting HR, you risk missing the bigger picture and building on unstable foundations that could impair your growth.

That's where HR software can help you tackle these challenges, as well as giving you the strong base you need to kick off your growth journey.

So, if you're asking yourself whether now is the right time to invest in HR software, **try to reframe your thinking: how much time, people and resources will I lose if I don't?**

At Charlie, we have the expertise to help you understand whether HR software is the right solution to the challenges we mentioned earlier – our CEO Ben Gateley has a lot of experience building and running small businesses, so he's always understood the doubts and challenges that come with HR – which is also how Charlie came about.

“It was difficult to keep track of everything when I dealt with HR at my previous company, and I really wanted to do right by the team, but sometimes I just had no time to commit to it. The team felt frustrated. I felt helpless. It was overwhelmingly difficult, even if, on the outside, it just looked like admin.”

Ben Gateley



We know that small businesses don't handle HR the same way large companies do, and that HR responsibilities are often handled by Directors, COOs, CFOs, CEOs, Founders, etc – the people with the most influence in the business. Shouldn't their time be spent on more impactful work? Probably, but how do you split yourself in two?

We don't, we just end up pushing HR to the back of the pile. admits Ben.

And that's where the problems start to build up: as a small business, you'll need to be 100% compliant to ensure peace of mind and avoid any legal issues. You also have to keep your employees happy to build a strong, high-performing team who are in it for the long run.

At the end of the day, if you're a small business and not ready to hire a full HR team, **the only way to achieve compliance, engagement, performance and employee satisfaction is getting HR software**, as scrappy processes just won't cut it.

Our HR software can take on this role for you – we are a small business ourselves (around 40 people) and we have around 11,000 small businesses in our customer base, so we understand what issues SME leaders like you struggle with, and we've built our HR software around them.

In this guide, we'll help you make the right decision for your business and understand why it's time for you to invest in HR software.



### Onboarding

Welcome new team members and seamlessly collect their data



### Polls

Run engagement surveys that give your team a voice



### Time off

Let Charlie handle your time off admin for you



### Perks

Give your team the experience they deserve



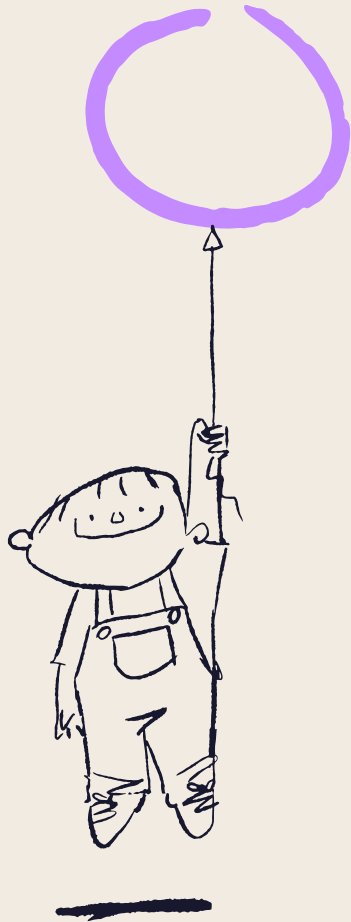
### Reviews

Help your team to grow personally and develop professionally



### Integrations

Easily integrate with the rest of your HR tech stack



# 2.

## Saving time with HR software



Maybe you're thinking you don't really need HR software because you've dealt with HR through a mix of spreadsheets, folders, and a handful of disparate systems to manage employee data and essential HR processes. That's worked so far, but it's becoming a bit too much to manage, and let's be honest, it doesn't look very professional.

Think about it: even if you only have five team members right now, **you'll need HR software someday – whether it's because you're hiring more people or because you're becoming busier as the business expands.**

It's better to be cautious with your time on each task now than to feel overwhelmed later. To give you an example of time-saving opportunities, we've dived deep into our most popular feature for small businesses: annual leave management.



**"Charlie is a great platform that makes HR playful, communicative and not at all redundant – everything is done seamlessly, and that's really what you need in your day-to-day small business life."**

**Sophie Hanman**

*Customer Happiness Manager @ London Nootropics*

[Read case study](#)



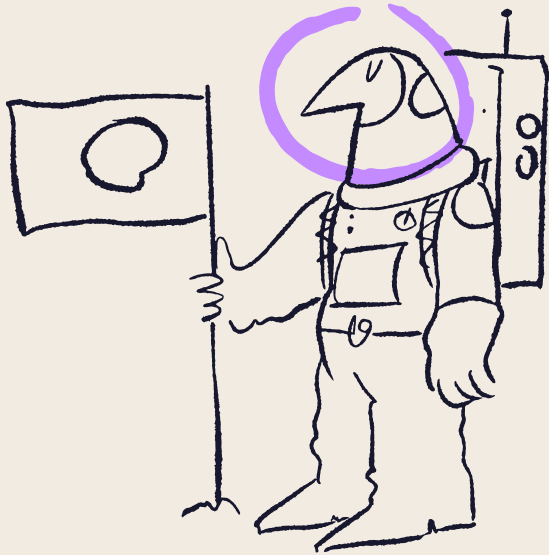
# Dealing with time off at your small business



## With spreadsheets and manual admin

- You're the only person who knows how to handle time off requests
- You need to remember to action a request if you don't do it immediately
- You receive requests via email and have to record all the details elsewhere
- You have to check everyone's calendars, allowances and dates before approving or denying requests
- You need to remember to add bank holidays to the total holiday count
- You're the only one who can answer questions from the team
- Your team doesn't know who is on holidays and when
- You don't necessarily communicate when someone takes sick leave
- You build a complicated spreadsheet to calculate allowances, record time off requests and type you allow people to carry over leave
- You have people based in different countries and locations which makes it even more confusing
- You're worried about making a mistake when you allow people to carry over leave
- You have part timers on payroll and have to calculate their allowance to make sure it's correct
- You have different types of time off that need to be recorded
- You need to review all of what's recorded in spreadsheets, calendars and else if a request is cancelled or amended

# Dealing with time off at your small business



## With HR software

- ✓ You can assign time off approval to different people in the business
- ✓ You receive an email and the request appears on the software dashboard as “pending” everytime you open it
- ✓ Your team members submit their time off requests on the platform – everything is recorded in one place
- ✓ Your team member can’t submit more than their remaining allowance, and Charlie flags overlapping time off at the review stage
- ✓ Charlie automatically adds bank holidays depending on the country you’re based in
- ✓ Team member’s time off and allowances are summarised on their profile
- ✓ The integrated company calendar gives the transparency everyone needs their time off in the software
- ✓ The Slack integration automatically sends a message through a company channel
- ✓ Allowances are automatically calculated, and can be tailored to your company’s holiday year and policy
- ✓ Charlie allows you to have different HR policies attached to each office
- ✓ You can add end of year’s carry over policies to the software
- ✓ You get to set working days that automatically adjust allowances
- ✓ You get to set custom leave types within the software so your team members can book it + set limits
- ✓ Your team members can cancel or amend their time off in the software

Our time off management feature is super complete and easy to use, and we keep on iterating as we go – it’s worth noting that all the changes and improvements we’ve made so far have been driven by customer feedback.



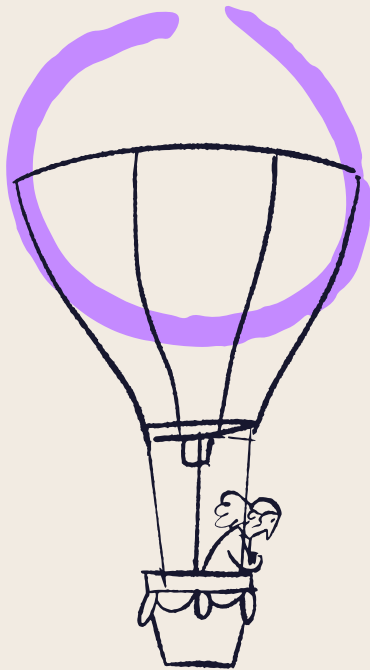
# 3.

## Successful HR without an HR team

If you've considered HR software, you've probably also thought about hiring an HR person.

Although having an HR person might sound like the perfect solution, some of our customers have found that it's not always ideal.

But if you do really want an HR person, that doesn't mean you should forego HR software as well. Let's first look at what an HR person does and what HR software can do.



Tasks	HR hire	HR software
Deal with time off requests and holidays	✓	✓
Onboard people by collecting documents and details	✓	✓
Hiring pipeline management	✓	✓
Builds an employee handbook and HR policies	✓	✗
Performance review setup	✓	✓
Holds disciplinary meetings and grievances	✓	✗
Keeps track of HR metrics	✓	✓
Organises social events and team building activities	✓	✗

# So when should you get HR software?

**Always** – simply because HR software allows for more flexibility than an HR hire and is less costly, so more suitable to the needs of very small businesses.

With HR software like Charlie, you can handle core HR tasks that keep you on a busy schedule and make a significant difference to your business, such as:

- Onboarding new team members
- Collecting and storing employee data
- Managing time off requests
- Answering basic employee questions about time off and company policies
- Creating performance reviews

Another aspect to consider is that, as you grow, Charlie allows you to adjust your budget with pricing brackets (find out more here). **This gives you more flexibility to manage costs without a significant price increase as soon as you hire more people.**

## And what if I need more than just HR admin?

Although hiring an HR person could look like the right call when you feel like you regularly need to update your HR policies, hire more people,

review your processes or even if you've faced a more challenging situation such as a [grievance](#), there's still other options to consider before you hire someone.

With Charlie, you can have add ons for HR support as well as recruitment:

- **Our HR advice service for ad hoc requests** such as building an employee handbook, reviewing employment contracts, addressing grievances or disciplinary issues, or any HR questions you might have.
- If you're planning to go on a hiring streak, you don't have to bring in a Talent expert or recruitment agency; **you can choose to use our Charlie Recruit ATS**. Our Applicant Tracking System will help streamline your hiring process by building a efficient workflow, scheduling interviews, scoring candidates based on their skills, and helping you establish criteria for your hiring process—without needing additional assistance.

And remember: HR software like **Charlie can be set up all by yourself** – hiring someone will be a longer process, and you'll need to train them too.



**Make your HR effortless**

Book a demo

# So when should I hire an HR person?

Ultimately, it really depends on your company strategy, but as you've seen, there are many options that don't necessarily require hiring an HR person when you're a small business.

Consider this carefully before making the decision to hire. If you find yourself in a tight spot, need to cut budgets, or simply don't have enough work for the HR hire, you may face the difficult and lengthy process of redundancy.

**With HR software, you don't have this long-term commitment** – you can cancel your subscription at any time and for whatever reason.

And if your team members leave, you can move to a lower pricing bracket to save money whilst still using Charlie.

## Should I get HR software and hire someone at the same time?

As you grow, it can make sense to hire someone to handle all HR and operations tasks such as office management, policies, etc. However, that doesn't mean you won't need HR software.

It's unlikely you'll find HR professionals who don't recommend getting HR software.

It's also useful to think about your HR person's hourly rate – you'll want them to spend time on more impactful work than just admin.



"Life is pretty scary without Charlie. It's so simple and reassuring, and it had a massive impact on our business on top of being budget-friendly. The HR advisors we work with just make us feel like they're part of the team, always in our corner for support. We finally feel like a proper company with Charlie by our side."

**James Chessum**  
Founder @ Red 5 People

[Read case study](#)



# 4.

## Staying compliant



"In all honesty, we don't even have to think about it. It's doing its thing in the background and it's great."

**Rachel Carrell**

Founder & CEO@ Koru Kids

[Read case study](#)

If you feel like your processes and policies are not up to scratch, it's likely you're exposing yourself to legal consequences.

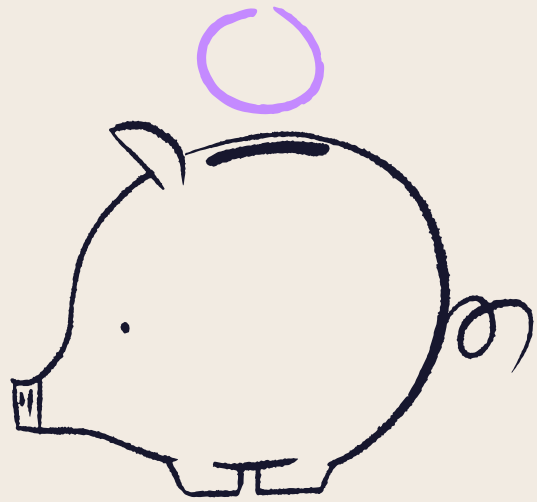
If "not doing things by the book" is a feeling you can't shake off, don't fall into the trap of ignoring it, hoping no one will come and check. That could have really serious consequences on your business and its future, as a legal fee could put it under completely.

**Investing early on in an HR solution that will guarantee compliance and streamline all your processes** will not only give you peace of mind, but also make sure your HR admin is free of human errors when it comes to compliance with UK employment law. Here's how HR software can help you do this:

- Running Right to Work Checks and securely storing important documents such as VISAs and passports
- Setting reminders for each team member for VISA expiry dates
- Letting your team members add and change any profile details as needed with different permissions depending on which field you'd like to keep control of

- Saving employment contracts, training agreements, salary changes, and more under one unique profile for each team member so they're easily accessible and secure
- Securely storing all your documents in software that's GDPR and ISO07 compliant
- Adding your employee handbook containing your mandatory HR policies directly on the platform, so you can easily make changes to it
- Upload your team members' payslips so they're attached to their profile
- Follow statutory leave law whether it's holidays, maternity leave, paternity leave or sick leave by adding all types of leave bookable on the software, plus set an allowance for each team member
- Use our remote working booking system to record team members working from home, if you've accepted their flexible working arrangements under the new 2024 law





# 5.

## Attract and retain on a modest budget

## Put your teams' progression first

[Book a demo](#)

On one hand, people have high expectations when it comes to work; they want to work for an employer who helps them advance in their careers and whom they can trust.

On the other hand, small businesses sometimes struggle to meet these expectations: they have limited resources and are not as established as bigger companies. Attracting and retaining the best talent gets tricky.

**That's where investing in areas such as career development becomes a significant asset, making you a more attractive employer – and that's where Charlie can help.**

Here's an overview of how you can use HR software to set your reviews/regular one-to-one's in just a few minutes:

- Select ready-made template to save time and not having to come up with questions yourself
- Include 360 feedback to have a more well-rounded view of your team's performance
- Tailor your review process depending on reviewer and reviewee
- Run a performance review process in three simple steps by selecting dates, letting the software send automatic reminders, and getting team members and managers to fill in their feedback

- Avoid getting involved and simply watch it happening from afar by following progress from an integrated dashboard

**HR software makes reviews super easy,** allowing you to put an impactful HR process in place that will allow you to retrain and attract more people.



**"It helped a lot and was a great tool for us to put together a performance review system that made sense."**

**Riannon Palmer**

*Founder & CEO @ Lem-uhn*

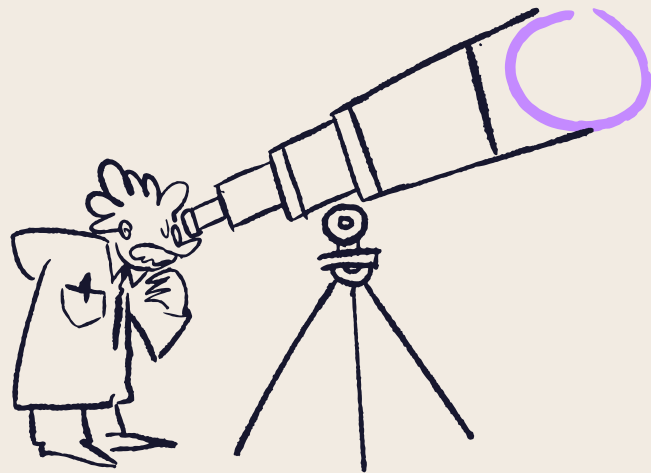
[Read case study](#)



# 6.

**Make it worth your  
while, spend money  
where it matters**

# So... Is it the right time?



Let's return to the question you had at the beginning: Is it the right time to invest in HR software? You may conclude that you can handle HR on your own and save money for your business at the same time.

Of course, HR software can be expensive for a small business, but have you considered how you're currently spending your money? Let's recap:

- **If you're a CEO or founder, you're likely the highest-paid person in the company, which means you can't afford to spend your time on admin tasks** — you need to make your time worthwhile. This is where HR software can offload HR responsibilities, allowing you to focus on growth opportunities.
- **If you're a director or part of the leadership team, the situation is similar.** You're expected to deliver results, but that can be difficult when your focus isn't 100% on your role. **Think of HR software as a long-term investment.** You won't have to worry about onboarding new hires and additional admin—everything will run smoothly in the background.

Regardless of why you're getting HR software or at what stage you are in your journey, it will always be worth the investment, as long as you choose a platform specifically built for small businesses, like Charlie.


Ultimately, not getting it now will only delay the inevitable need for it later.

But what does that mean from a pricing perspective? That's where Charlie comes into play. With our pricing brackets, we take growth into account to help you sustain the cost of HR software as you grow.

Headcount	Price
1-4	£5
5-9	£40
10-14	£40
15-29	£100
30-49	£170
50-99	£300
100-149	£400
150-199	£500
200-249	£600
250+	£700

# How Charlie helped small businesses with their HR

Check out all of our customer stories and learn how Charlie can help you too



[Customer stories](#)

## Daye

**50**  
hours saved per month

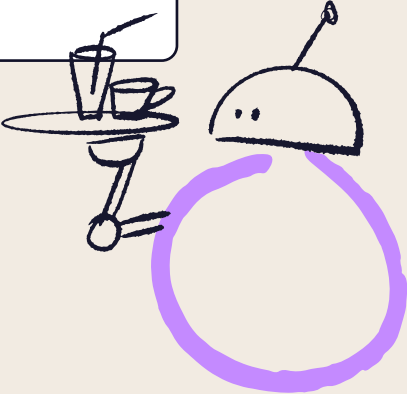
From **2** to **45** employees

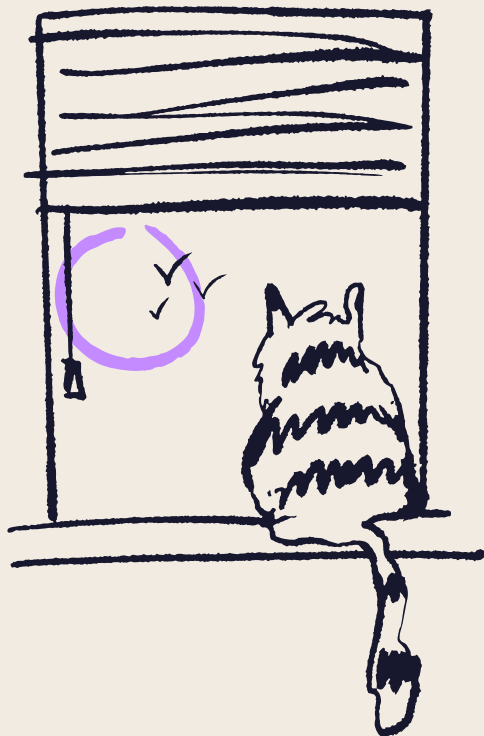
Customer since **2018**

## seo works

**5 to 10**  
hours saved per week on HR

Began their journey with Charlie in the process of expansion and grew from **48** to **90**





# 7.

So, is it really time to invest in HR software?

# Get back to the work that really matters

As someone responsible for HR at your small business, getting HR software will be a great way to ensure you focus on your actual job again, and this can be done efficiently and for a reasonable price without having to hire an HR person.

## With HR software like Charlie, you'll be able to:


- Save time now and in the long run by **investing in a solution that can grow with you**
- Take care of your core **HR admin tasks** such as time off, onboarding, document and employee database
- **Be 100% compliant** when it comes to employment law requirements with a software that's GDPR and ISO9007 compliant
- **Put together a performance management system** that will allow you to focus on your team's growth without too much unnecessary effort
- Punch above your weight with engagement surveys and a free employee perks platform to delight your team

## Before Charlie

- ✗ **Wasting time** dealing with every time off request yourself
- ✗ **Tired** of never being able to find employee info or company docs
- ✗ **Too distracted** to focus on your own work
- ✗ **Worrying** when legal compliance is finally going to catch you out

## After Charlie

- ✓ **Wasting time** dealing with every time off request yourself
- ✓ **Tired** of never being able to find employee info or company docs
- ✓ **Too distracted** to focus on your own work
- ✓ **Worrying** when legal compliance is finally going to catch you out



**Make your HR effortless**

[Book a demo](#)