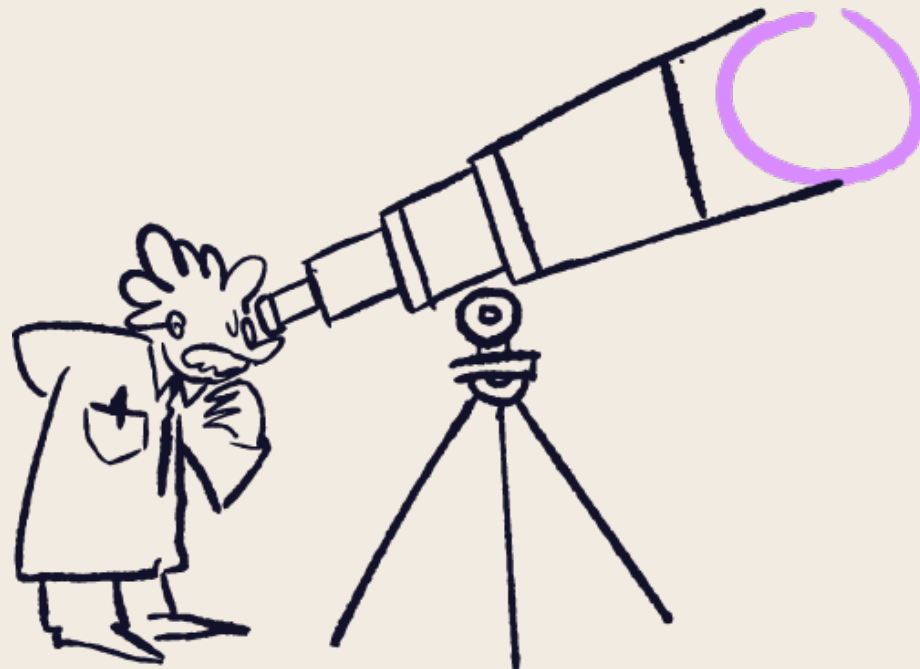charli.e.

Time off management

Ditch spreadsheets & build the HR processes your small business needs

Why and how to smoothly transition from manual to automated for better growth and visibility

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1. How does time off affect your small business? ⌄

2. How do manual and automated time-off processes compare? ⌄

3. Is automated time off management a myth? ⌄

4. How small businesses simplify their time off process ⌄

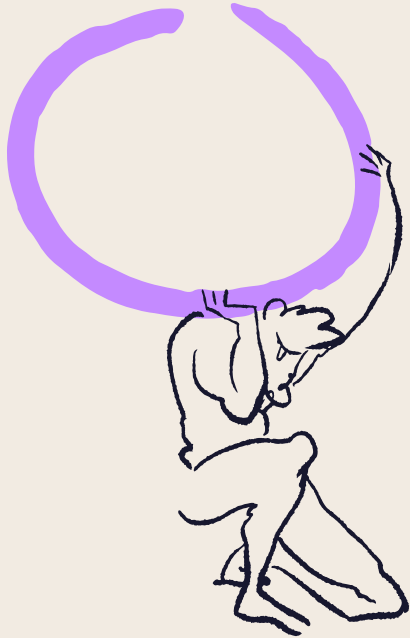5. So, what do you gain by automating your time off process? ⌄

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1.

How does time off affect your small business?

4

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How does time off affect your small business?

As a small business, you know that efficient processes are essential for reducing manual work. But when it comes to managing time off, many struggle to find solutions that save time and reduce complexity.

At first glance, time off management may look simple: a team member requests time off, you approve it, add it to the company calendar, and then move on.

But then, you realise there's much more to it:you have to set up a separate system to handle carryover, calculate allowances, record sick leave, accommodate for other types of leave such as bereavement,... The list goes on and on.

By speaking to small business owners and HR professionals, we've found out that time off means different things to different people:
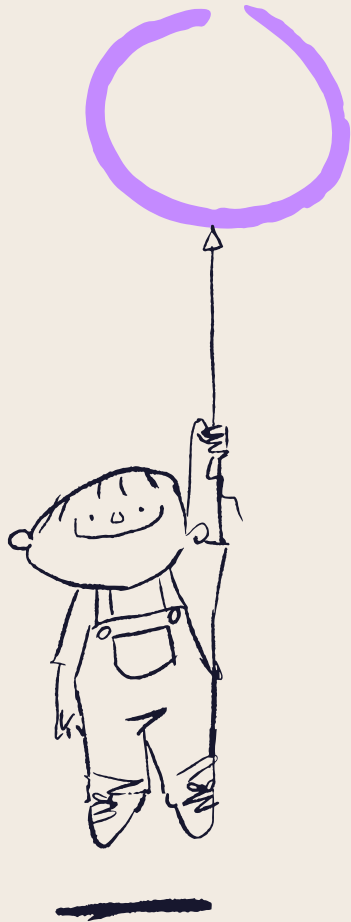
- **Team members** value booking their holidays stress-free with clear information about their allowances.

- **People responsible for HR** (CEOs, founders, ops managers, directors, and more) want to reduce the admin overload and ensure their processes reflect a professional, well-run business.

- **HR novices** want to be 100% sure they're compliant – calculating pro-rata leave isn't easy, and it's crucial for your team members to get correct allowances and payslips.

At Charlie, we've **faced these challenges too** and we regularly talk to our small business customers, so we understand what they need and improve our product based on their feedback.

Over time, we've built our time off feature so it matches people's expectations. After all, time off is small businesses' first concern when it comes to HR.

Now, ask yourself: is your current process helping or holding your team back? Is it living up to the standards you set up for yourself as a "proper business"?

All in all, you can't run a business without time off management. In this guide, we want to show you how you can easily change clunky spreadsheets and scattered emails into a professional and straightforward process. Let's dive in!

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2.

How do manual and automated time-off processes compare?

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FIX RADIO
THE BUILDERS STATION

"Time off seems like such a simple process, but it can actually make the admin pile up without a proper tool. It also requires coordination for a team like ours, so it's great to have Charlie for that now."

Jonathan North
Head of Ops @ Fix Radio
5 team members

Read case study

Ditch clunky time-off management

Book a demo

Managing time off impacts many areas of your business — and as your team grows, so does the complexity. Every team member has unique needs — so how do you support them all without getting buried in admin?

Manual   VS.   Automation

Manual	Automation
❌ You're the bottleneck for time off requests	✅ You can delegate, or handle it by yourself – efficient and easy
❌ You need constant reminders to record time off requests	✅ You get pinged, click on a link, approve or deny, move on to something else
❌ You go through Slack, calendars, emails, spreadsheets before saying yes or no	✅ You have all the info on one platform and can make quick decisions
❌ You constantly double check calculations for time off	✅ You let the software do the math for you – no human error
❌ You don't know who is off and when, and neither does your team	✅ Your team calendar gives you full visibility of who is off, why and when
❌ You're struggling to keep track of all the different types of leave people take	✅ You have full visibility on your team's time off and can download detailed reports
❌ You've had people off at the same time without noticing	✅ You get flagged if people are off at the same time

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3.

Is automated time off management a myth?

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Is automated time off management a myth?

Time off management is a part of every business. If you're not managing it directly, someone else will, which will eat into their productivity and take time away from more impactful work.

For small businesses without a dedicated HR person, manual time off management can cost a lot, especially when employees sit between HR and another role (how much time are they actually spending on HR, instead of their official title?).

The solution is to find a tool that can save time and mental space, doing the heavy lifting for you, as you can't afford to have your team wasting time on tasks that don't add real value.

So, what if time off could become a more hands off process?

Take Charlie, for example. Let's say you sign up for a free trial — your time off process is then ready to go. The allowance is automatically set to 25 days, aligning you with the UK's statutory leave.

And if you need to make changes, it can be done in just a few clicks:

- **Add your holiday year start date** — whether it's in April, January, or another month.

- **Implement your holiday policy** — unlimited allowance, 25 days, or more.

- **Set the carry-over allowance for your company** – choose to allow team members to carry over unused leave, or not.

- **Adjust public holidays** – include bank holidays for the country you operate in within the allowance, or don't.

Holiday year

Set your holiday year start date

Start date
2025

Confirm

Holiday policy

◯ Unlimited allowance

Create time off allowances

Allowance limit
25.0 days

Confirm

Carryover allowance

◉ Allow carryover

carryover limit

yover limit
ays

Confirm

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Remove time off from your to-do list

Take London Nootropics, a health and wellness brand with 15 team members. Since 2022, they've been using Charlie to manage all their admin, including time off tracking. What used to be the CEO's responsibility is now handled by their Customer Happiness Manager, who makes it fit into her role with no distraction from her main responsibilities.
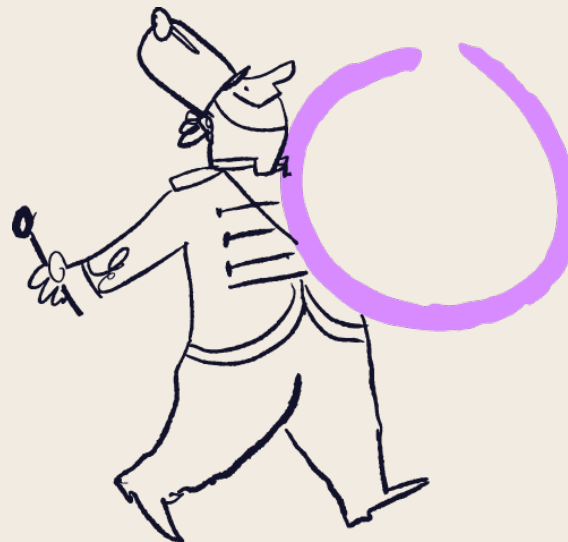
LONDON NOOTROPICS

Before Charlie, it was something people had to think about and taking holidays almost became another job on the to-do list. It's now so seamless we don't even have to think about it.

Sophie Hanman
Customer Happiness Manager @ London Nootropics

Read case study

Seamless, effortless time off management with Charlie
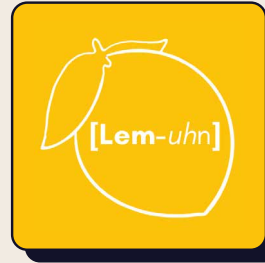
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4.

How small businesses simplify their time off process

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More visibility, less admin

Let's dive a little bit more into how our customers have been using Charlie for their time off management process, so you can see for yourself the benefits of using Charlie as a small company.

[Lem-*uhn*]

Industry: PR

Team size: 6

Charlie users since: 2023

Main challenge: getting rid of manual time off management

Benefits of using Charlie:

- **More visibility** – reports, company calendar and charts helped the CEO easily keep on top of all types of absences including holiday and sick leave.

- **Everything in one place** – no more looking for information, it's all securely stored and quickly accessible on one platform.

"Holidays was the first pit stop, but we're very much looking forward to further enhancements on top of what we already have with Charlie."

Riannon Palmer
Founder & CEO @ Lem-uhn

Read case study

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Easy to use, set up and manage

Industry: Recruitment

Team size: 5

Charlie users since: 2023

Main challenge: reducing admin-heavy tasks

Benefits of using Charlie:

- **Runs itself** – time off is as low touch as possible with admin tasks running in the background.

- **Easy set up and use** – a platform that is very no fuss – independent set up, and user-friendly.

"Before Charlie, we were like sitting ducks with HR. I now feel so much more in control of what happens at the company, and it's all automated."

James Chessum
Founder @ Red5 people

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5.

So, what do you gain by automating your time off process?

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Efficiency, reputation & scalability

Sure, you could keep on handling time off the way you've always done – by responding to emails, recording time off into spreadsheets, adding it to your calendar, ensuring the calculations and type of time off are correct, undoing everything when someone wants to cancel or amend a request.

But if you've downloaded this guide, you already know there's a better way.

By talking to small businesses, we've identified a few common themes you might come across at different stages of your growth:

- **Efficiency:** Save precious time by centralising HR tasks all in one platform.

- **Reputation:** Manage your business professionally and build trust with your team.

- **Scalability:** Build sustainable processes that will easily scale as you grow.

Managing HR and time off isn't just about keeping things running smoothly today — it's about setting your business up for success tomorrow. So think ahead, and make small adjustments to avoid having to look for a solution, like HR software, when it's already too late.

After all, your workload will probably get bigger as your company grows. To give you an idea of what automation could help you achieve as you scale, we've listed the main HR processes you can solve with an all-in-one platform:

- **Effortless onboarding** – make sure everything is compliant with all documents and details collected, and information delivered at the right touchpoint.

- **Stress-free compliance** – Keep your business 100% compliant with securely stored data, easy calculations, and instant access to what you need.

- **Easy performance reviews** – a simple and efficient way to run reviews for your team's development and to differentiate yourselves (especially when big perks aren't in the budget).

- **Boosted team engagement** – show your employees you care by rewarding them, and acknowledging their successes.

To find out more, we'd encourage you to **book a demo** with one of our experts so they can give you a full tour of what CharlieHR can do and see whether or not it's what you need.
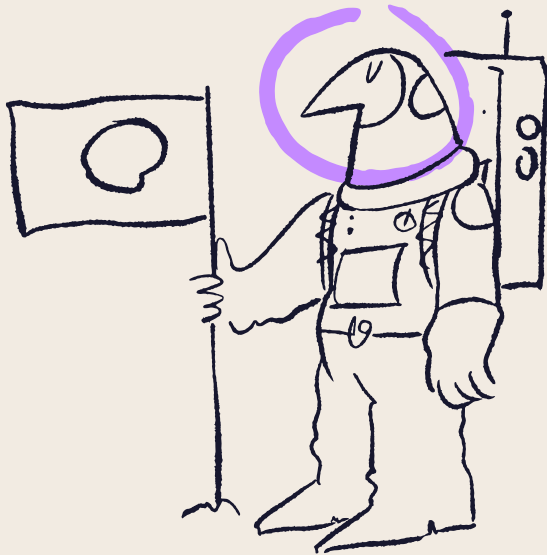
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Ready to make your HR effortless?
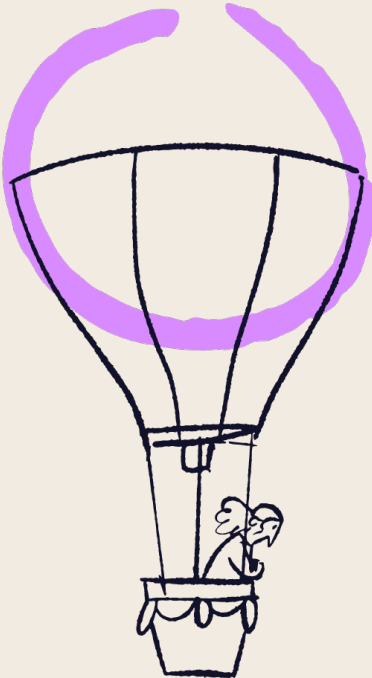
CharlieHR

✅ Easy set up

✅ Intuitive platform

✅ Full visibility

✅ 100% compliant

Book a free call today

Chat with Josh, our HR software expert

✅ 30 minutes tops

✅ Full platform tour

Book a demo

Sarah has a pending holiday request

Alex starts tomorrow

Chris submitted his review feedback

NEW POLL RESULTS
'I feel excited about the opportunities hybrid / remote work offers'

- 60%
- 20%
- 10%
- 5%
- 5%

So, what do you gain by automating your time off process?

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