

# Using Technology to Streamline HR

How to make and support your decisions, sell the investment to management and implement it— without losing your mind.

# Today's Presenter



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# HR Technology Level Set

The background features a series of light blue, wavy lines that create a sense of motion and depth, resembling a stylized wave or a series of overlapping curves. The lines are thin and spaced out, creating a subtle, modern aesthetic.

# HR Technology Defined

## Level Set

### Examples of this are:

- Recruiting and applicant tracking
- New hire onboarding
- Time and attendance tracking, scheduling
- Payroll
- Performance and compensation management
- Benefit administration and Affordable Care Act reporting
- Learning and development
- Other items such as expense management, surveys, organizational charts, total compensation statements, vaccine tracking

Any technology solution that manages your people.

AKA HRIS, HCM, full suite HR or people technology.

## Poll Question

**Which HR  
technology solution  
does your  
organization use  
today?**



## Poll Question

**What is the #1 pain point you are experiencing in that solution today?**



## Poll Question

**Have you been through an HR technology implementation before, and how did it go?**



# Why is this such an important topic?

Key Insights from Josh Bersin Report – The Definitive Guide: HCM Excellence

## ■ Why HCM Excellence Is Important

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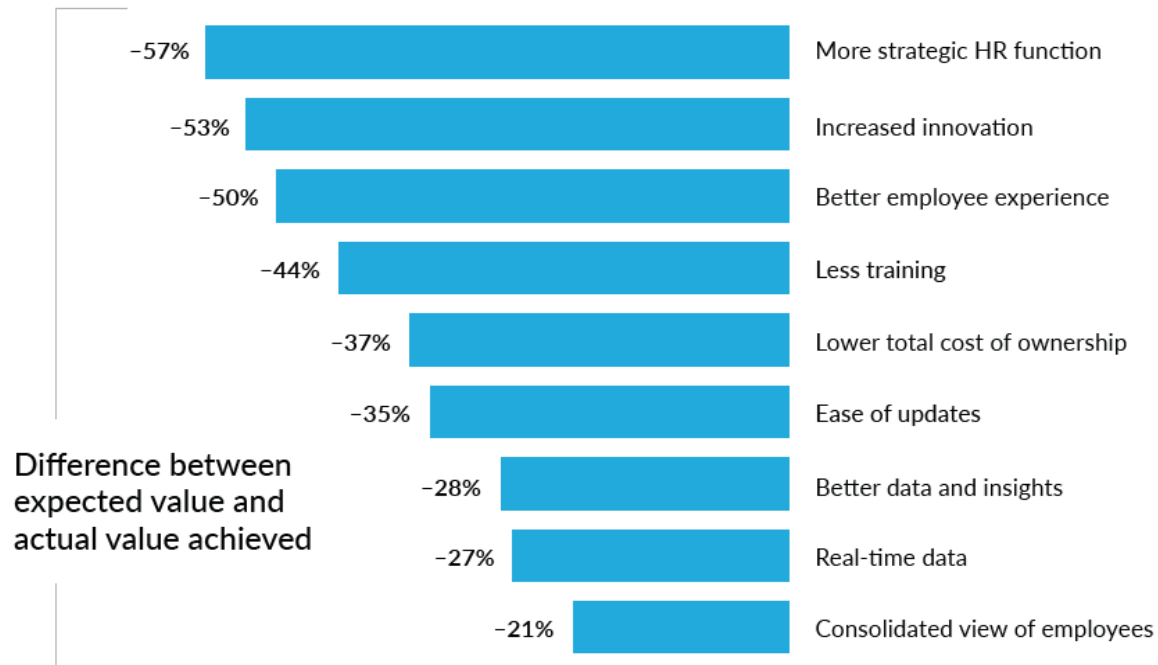


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# My goals today

Let's get started

- Share tips on evaluating HR technology
- Tell you WHY and HOW
- Provide examples
- Offer practical resources to help you in future projects
- Answer any questions you have



**Identify the opportunity**



# Identify the opportunity

Why is this important?

This process provides you with valuable data, helps set the stage, and gets buy-in for improvement to the process.

# Identify the opportunity

How do I do it?

Create a survey or hold listening sessions about the HR process and the technology you use in the organization.

- What are the common complaints and wish list items?
- What are the roadblocks in the process today?
- Are there spreadsheet or paper supported steps?
- Do you find what you need when you need it, and can you do that without asking anyone?
- Ask about phases in the employee life cycle, such as recruiting, new hire onboarding, making a change, submitting and approving time.

# Identify the opportunity

How do I do it?

**For each area of HR, survey the administrators of your current solutions.** Make sure to ask the big, strategic questions AND the little details.

## Big strategic questions

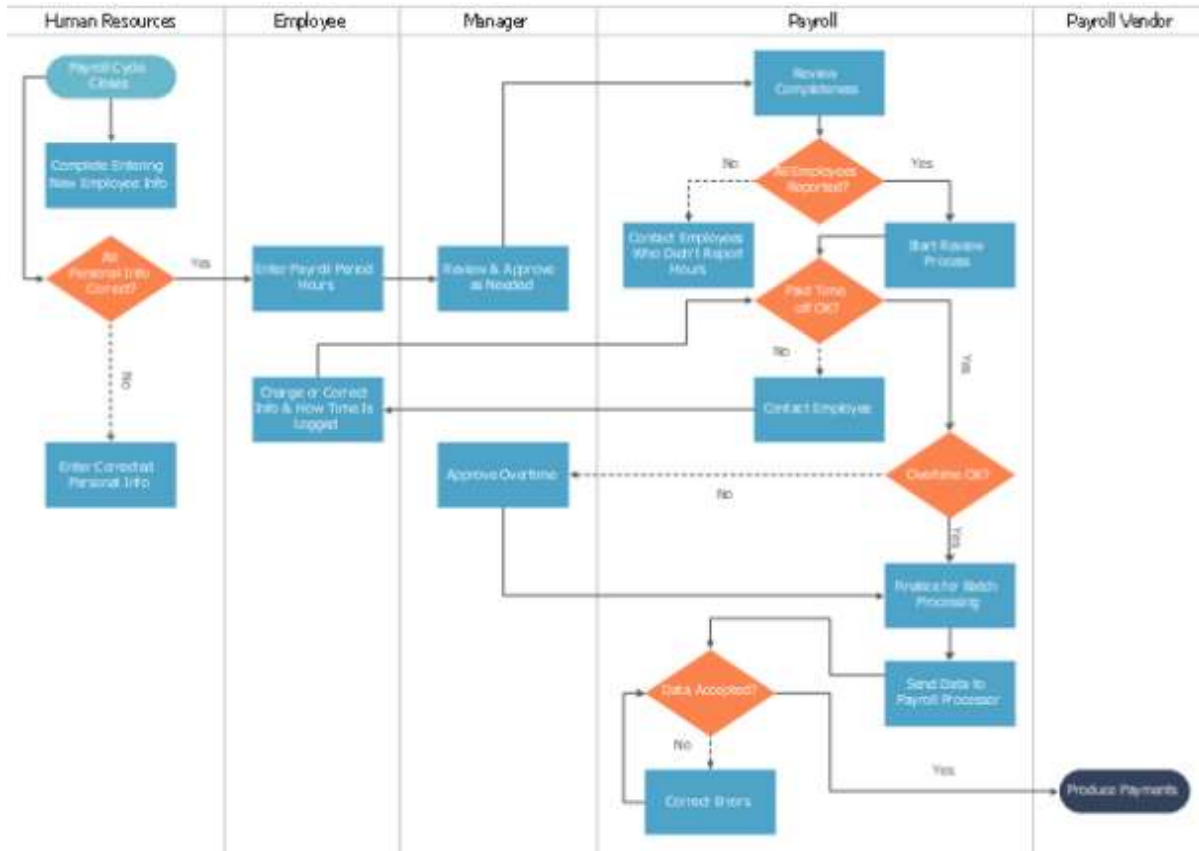
- Are employees getting accurate paychecks and are they on time?
- How much time does it take to run payroll each period?
- How much time does it take to post, recruit, hire, and onboard a new employee?

## Little details

- Document the payroll process, step by step, starting with how managers review and approve time.
- What kind of reporting do you use? Are there reports you wish you had?
- Where is the technology vendor supporting or not supporting the process?

# Identify the opportunity

## Payroll process workshop examples



A photograph of a business meeting. In the foreground, a person's hand points to a document with various charts and graphs. In the background, two women are seated at a table, looking at the documents. One woman is holding a pen. The scene is set in a modern office environment with warm lighting.

**Evaluate your  
stakeholders**



# Evaluate your stakeholders

Why is this important?



- Assures that you aren't making assumptions about where people are at with change.
- Helps identify potential team members, change champions, storytellers, and early adopters for the project.
- Provides awareness for the project team of the staff that may throw hurdles in your way.
- Helps you evaluate and create your change management plan.

# Evaluate your stakeholders

How do I do it?

# 1

## Ask Questions

Interview or survey the players and decision-makers in your organization

# 2

## Evaluate Opportunities

Identify what is important and where decision making and change management hurdles come in

# 3

## Establish Priorities

What do they care about, and what are “must haves” for them to be on board with a new solution

# 4

## Make a Plan

Identify strategies for encouraging the early adopters and accommodating those who lag behind

# Evaluate your stakeholders

## Example Stakeholder Analysis

Stakeholder group	Contact person for this group	Impact in the organization	Influence in the organization	What is important to the stakeholder?	How can this stakeholder contribute?	How could this stakeholder delay the project?	Strategy for engagement
Managers	Minnie Mouse	Early adopter, high impact	HIGH	Ease of use, mobile, reminders and workflows	Attend the demonstrations, provide feedback, be a change champion	If we step back in these areas, this Manager has high influence and others will follow her lead	Keep her involved, ask for feedback, and tap her to be a champion for the cause
Office team	Donald Duck	Medium	Medium	Isn't interested in learning something new	Show him how easy it will be, training on a need to know basis	Can be somewhat negative, will share distrust of the new solution and that could spread to the rest of the team	Positive messaging, high level training, keep it easy, frequent check-ins

**Build your team**



# Build your team

Why is this important?

**Every organization is different, but there are some constants in these big, complex projects.**

- If you have more talkers than doers, the work doesn't get done
- Decision makers and subject matter experts should be part of the whole process
- Positive, early adopters will tell the story to the rest of the company
- These projects are a lot of work, it helps to broaden the team and lighten the load

# Build your team

## How do I do it?

- Evaluate your surveys and stakeholder analysis, and get the right experts and doers on the team.
- Give new team members the opportunity to participate.
- Include your subject matter experts.
- If you don't have all the right team members, consider hiring a consultant with expertise in this area. Ask your insurance broker, HR contacts, and local SHRM for recommendations for consultants.
  - They know the industry
  - They are your advocate
  - They have a methodology that works
  - They will provide support materials

# Build your team

## Exercise 1: Project Team Roster

Name and Email	Role in the Organization	Role on the Guiding Team
	CHRO	Executive Sponsor
	HR Director	HR Leader
	IT Director	IT/Security
	CFO	CFO/Accounting
	Payroll	Data Specialist
	Payroll	Subject Matter Expert
	HRIS Analyst	HRIS Analyst
	PMO/Project Manager/Consultant	Project Manager
	HR Manager	Subject Matter Expert
	Recruiter	Subject Matter Expert
	Benefit Administrator	Subject Matter Expert
	Marketing Manager	Communications, branding

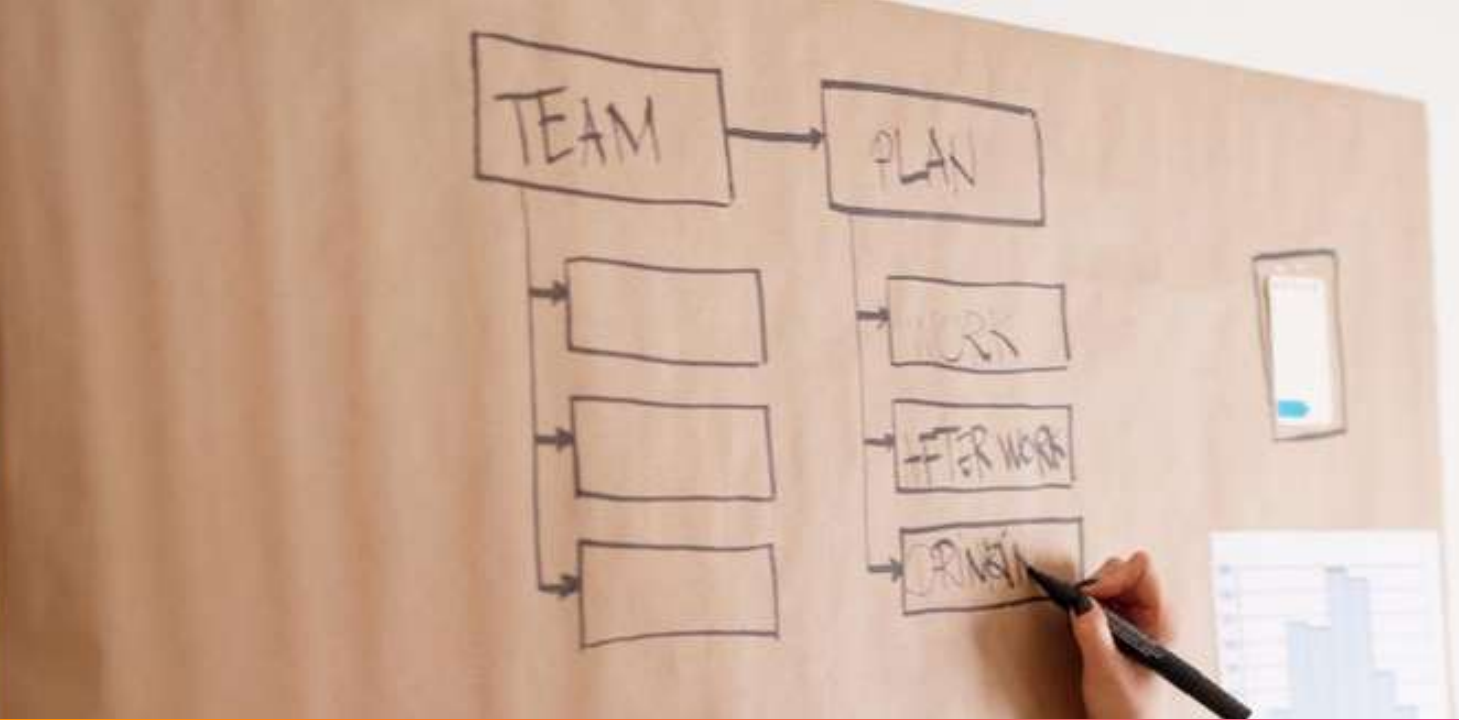
# Build your team

## Exercise 2: Set Ground Rules

### Project Team Ground Rules

- ✓ Be on time, be prepared, and be present
- ✓ Project manager will share an agenda at least 1 day in advance
- ✓ Project manager will take detailed notes, track decisions and parking lot items
- ✓ No disruptions: phone, email, text
- ✓ If you disagree, share with the project team
- ✓ Even if you disagree, speak positively about the project to the rest of the organization
- ✓ Speak respectfully and be candid
- ✓ Share solutions and options, not just complaints
- ✓ Respect confidentiality





**Create a vision**

# Create the vision

Why is this important?

- Establishes a common sense of purpose
- Helps create a common understanding
- It's inspiring!



# Create the vision

How do I do it?

- Schedule ongoing meetings with the team.
- Evaluate the data collected so far from stakeholders, evaluate and document those details together.
- Focus the vision on outcomes and people, not about process.



# Create the vision

How do I do it?

**Tell the story about your new solution, as though it is already implemented.**

- Why are we doing this for our employees, candidates, managers, executives, and administrators?
- What is most important?
  - That it is user friendly? Mobile? That it projects your brand and values? That it enables your workforce to do their best for clients everyday?
- Consider branding the project to further solidify its importance.
- Establish check ins and goals to be sure the vision is succeeding. This work doesn't end.

# Create the vision

## Vision Example

### Vision Statement:

Our HR technology solution reflects our brand and company vision as an innovative and inclusive leader in our industry, offers a user friendly and mobile experience, which enables our colleagues to have a frictionless experience with HR so that they can focus more time on wowing our clients.

# Research & evaluate vendors

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# Research vendor options

Why is this important?

- **Client Case Study 1: This Won't Work LLC**

- Client Opportunity – TWW LLC was looking for a benefit administration technology. The process was paper based, and HR entered employee changes in the insurance carrier websites.
- Vendor Options – TWW needed a partner that could handle their benefit complexities. However, they signed on with a vendor that had been calling them, without looking at other options. They didn't share all their detailed benefits and employer contribution details with the vendor in advance.
- Outcome– the selected partner found that during implementation, they couldn't handle some of the employee contribution structures. The vendor and client had to come up with workarounds to get it close but not accurate. The outcome was continued manual processes.



# Research vendor options

Why is this important?

- **Client Case Study 2: Right Fit Inc.**

- Client Opportunity – Right Fit Inc was looking for time and attendance technology. Employees tracked time off on paper sheets, and punched in on time clocks. Then, each week the payroll manager reconciled time off and time worked on spreadsheets before loading into payroll.
- Vendor Options – As a client with complex time tracking needs and varied work groups, they needed a partner that could handle those complexities. They completed a thorough needs analysis with a consultant, that was able to recommend three options to consider.
- Outcome – RFI shared the details on the manual processes, including schedules, attendance points, time off accrual policies, and chose the vendor that could best meet those needs.



# Research vendor options

## How do I do it?

- Vendor research and evaluation is a key place where a consultant can help—especially by helping to identify a list of vendors that “could” meet your needs based on your size, industry and the complexity of your needs in HR.
- If relationship with your current vendor is not broken, also allow them the opportunity to make the case for how improvement and enhancements in the solution can achieve the desired outcomes.
- Other resources could include: Members of HR groups, G2.com, Gartner, Trustradius.com, NOT just Google!

# Research vendor options

## Example: Today's HR Tech market

**Today's HR Tech Landscape** As of 24 March 2017 | Click logos to visit a company's website | Something missing? Or want to learn more? Reach me at [wsaborio@gmail.com](mailto:wsaborio@gmail.com) :)

**Recruiting**

Talent Discovery: JOPWELL, KORA, ATIPICA, PIVOT, boon, SMASHFLY, WeFind, Stella, phenom people, twjne, entelo, textio, workable, PRO SKY, SpringRole, Resource, RolePoint, HIPERPOOL

Job Markets: workpop, Tackl, handshake, WayUp, JOBBIO, PowerFly, TalentSky, alongside, Hireology, jobillco, burningglass, WorkAmerica, PURPLE SQUIRREL

Technical Sourcing: VETTERY, source(d), TRIPLEBYTE, HIRE D, NAVISOURCE, #Angellist, Nomad, underdog.io, HackerRank, tarentful, LYTMUS, interviewing.io

Interview Tools: plum, LearnUp, CRITERIA, interviewed, pymetrics, HireVue

Workflow Management: LEVER, JazzHR, Unitive, TextRecruit, SmartRecruiters, greenhouse, recruitee

**Flexible Hiring**

On/Shift, jobbotical, OneSpace, jobandtalent, SWIFT SHIFT, workgeni.us, CATALANT, toptal, skedulo, Andela, PERCOLATA, ASSURED LABOR, Wonolo, cornerJOB, FIELD NATION, shiftgig, Crew, Upwork, Lystable, ximble

**Onboarding**

Checkr,rippling, onfido, envoy, OnboardIQ, yoi, Click Boarding

**Quantified Workforce**

humanize, Theatro, HEADS UP, hiQ

**Recognition & Rewards**

O.C.TANNER, Achievers, perkbox, globoforce, Bonusly, Blue3

**Performance Management**

logi:serve, Reflektive, Lattice, BetterWorks, Game:effective, SixQ, impraise, engagedly, WIDE ANGLE, workboard, AMBITION, ZUGATA, Si, Small Improvements, LIGHTHOUSE

**Learning & Development**

paysa, Pathgather, Jhana, Axonify, Landit, go, the muse, udemy, LearningSpaces, BetterUp, degreed, Joanko, TASYTT, WORKRAMP, CAPABILITY, edcast, CommercialTribe, NovoED

**Employee Engagement**

Culture Amp, CULTUREIQ, Telmetrix, BetterCompany, TemboSocik, Hyphen, qualtrics, questback, SalaryFinance, RoundPegg, Rallyware, HighGround, KOAN, workjam, simpplr, wisetail, officevibe, GLINT, TINYpulse, COMPARELY

**Integrated Management Suites**

PLANSOURCE, GUSTO, InvestiPro, payfit, Planday, homebase, EVERWISE, air, charlie, starling, GuideSpark, Sympa, people, GREYTIP, VISIER, shiftmessenger, Humi HR, Namely, collage, When I Work, HeavenHR, Think, bob, sapho

**Compensation & Benefits**

forusall, SimplyInsured, Compia, Lumity, JUSTWORKS., Maxwell | Health, BeneStream, URBANBOUND, Espresa, benevity, EMPYREAN, MOVE GUIDES, ANY PERK, allay, Wellbit, Lifeworks

# Evaluate vendor options

## Why is this important?

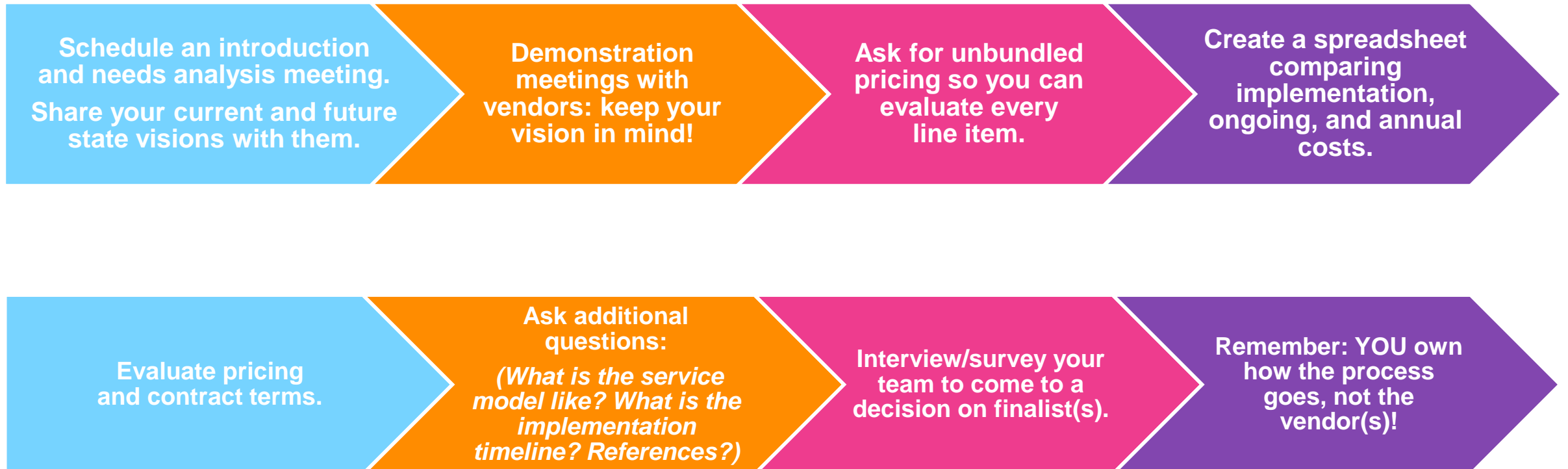
- Vendors will highlight their best features, and minimize the ones that aren't as strong.
- Stay true to your vision and desired future state, and ask questions.
- Do not take Yes for an answer! Ask for **proof**, examples, case studies, references, etc.



# Evaluate vendor options

How do I do it?

There are a handful of steps that ensure a consistent experience across vendors during an evaluation.



# Evaluate vendor options

Exercise: Create a scorecard for your teammates

**MMA TECHCONNECT**

**Demo Scorecard and Questions to Ask**

VENDOR NAME: \_\_\_\_\_

**MARSH & McLENNAN AGENCY**

**APPLICANT TRACKING AND RECRUITING**

What did you like about this solution?	
What did you NOT like about this solution?	
Would this solution meet your organization's needs?	
Follow up questions	

Love it  
 Like it  
 Dislike it

**Questions to ask during the demonstration:**

- Is it easy to use for recruiters and hiring managers?
- Is it mobile-optimized for candidates and the hiring team? How does the experience hold up on mobile?
- Does it deliver an engaging candidate experience?
- How does it help you communicate internally and with candidates?
- Does it help you stay compliant and sensitive data secure?
- Does it give you real-time and actionable analytics like time to fill and best sources for applicants?
- Is there a separate vendor behind this module? Are there any duplicate logins or separate vendor service teams for this module? Does it integrate with your HR suite?
- How many clicks does it take to submit an application?
- Is a login required for candidates? What are the pros and cons of doing it that way?]
- Is there a way to keep in touch with silver medalists to help build a candidate pool?
- Can it allow the hiring team to provide feedback and collaborate about a candidate?
- Can you manage interview schedules, review and submit approvals, offers and requisitions from your mobile device?
- Skills matching to connect candidates with open requisitions?
- Is there functionality for employee referral tracking?
- Are admins and managers able to see calendars, schedule interviews and send invites directly?

**MMA TECHCONNECT**

**Make the case**





# Make the case

## Why is this important?

- For many organizations, a business case is required to get approval from a board or an executive.
- You are providing all stakeholders with a transparent and evidence based reason for your decision.



# Make the case


## How do I do it?

- Keep your case focused on the people, the business need, and the vision.
- Explain how the chosen vendor's features, service model, timeline, and profile match the vision you created.
- Provide details on the cost of the new solution and the ***cost of doing nothing.***
- Explain the timeline, when internal resources are required, how that aligns with less busy times in the organization.
- Identify if an implementation consultant is required to complete an implementation and how they will fill gaps on the implementation team.
- Lean on your communication experts and storytellers!




# Make the case

## Exercise 1: Create your business case



### HR Technology Business Case




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#### SOLUTION RECOMMENDATION

<b>Recommended HR Vendor Name</b>	
Functionality Overview of Solution Recommendation	
Fee – Implementation	
Fee - Ongoing PEPM	
Fee – Annual	
Overview of current state:	
Desired future state:	
How will this HR practice improve with the recommended vendor?	



2

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# Implementation and change management

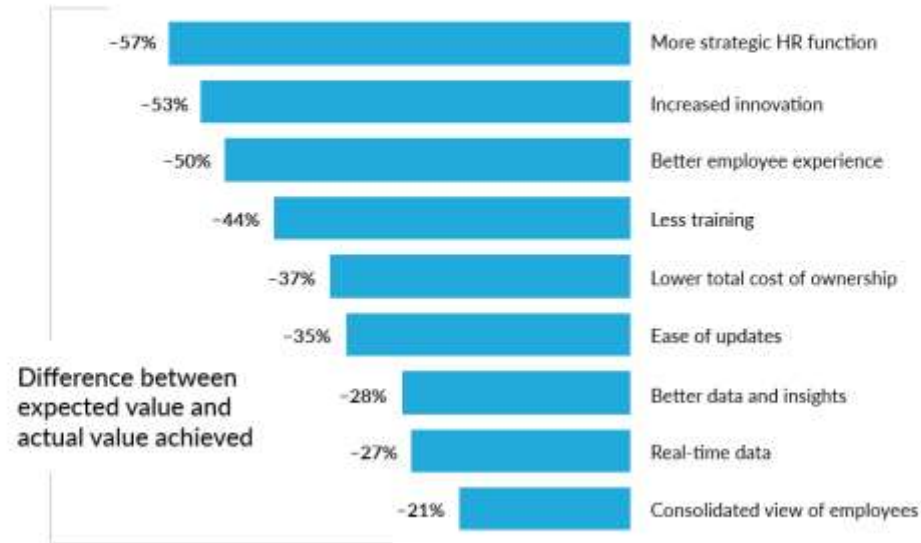


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# Implementation and change management

How do I do it?

# 1

## Take ownership!

- It is up to your team to manage the deliverables, and make sure that the solution is implemented in a way that aligns to the vision you created

# 2

## Make sure the right team is in place!

- Review your team, and stakeholder analysis again

# 3

## Data data data!

- It is CRITICAL to have a data expert on the team to evaluate and test data in the new solution and make sure the right people, locations, classes, pay types are accounted for

# 4

## Change champions!

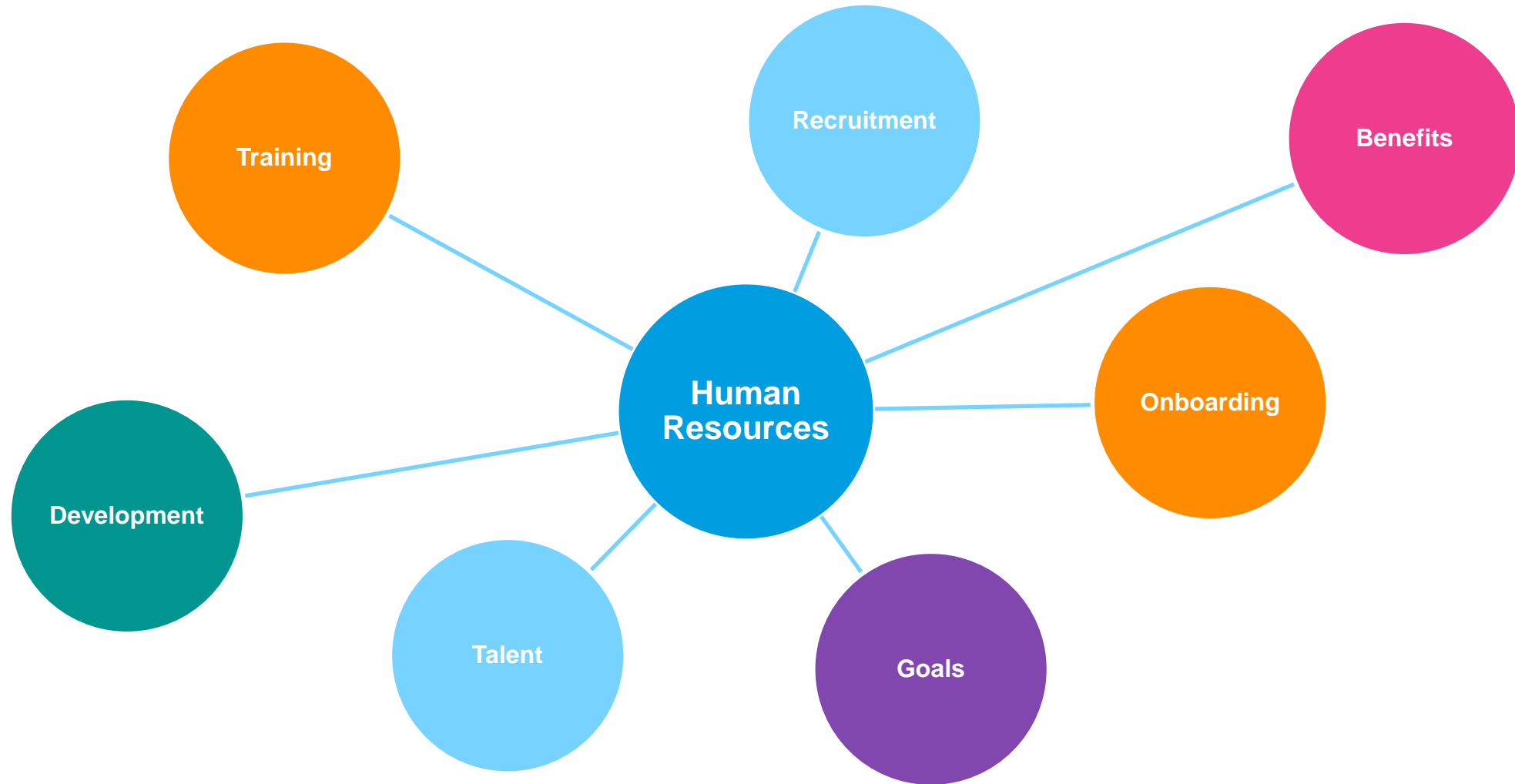
- Give different team members new opportunities
- By empowering others, this will take some of the load off the primary decision makers on the implementation team.



**... Am I done?**

# This is an ongoing process!

Why is this important?



# This is an ongoing process!

## How do I do it?

- When your vendor confirms that your system is live, keep checking in with your stakeholder groups for ongoing opportunities.
  - Document issues, areas of improvement, and wish list items for the future
- Take ownership for knowing the solution inside and out. Take all training and dig into the questions!
- In years 2 and 3 research/evaluate additional/new features. Attend the vendor conferences/webinars and stay close to your service representatives.
- Interpret your data
  - Over time, more meaningful data in your solution makes it more powerful

Keep  
optimizing  
and  
evaluating

Questions?



MMA  
**TECHCONNECT**



# Your future is limitless.<sup>SM</sup>

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