Using Technology to Streamline HR

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

Your future is limitless.℠

Today's Presenter

Shannon Klick, PMP

Technology Consultant, Marsh McLennan Agency

Shannon.Klick@MarshMMA.com

Connect with me on LinkedIn!

HR Technology Level Set

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?

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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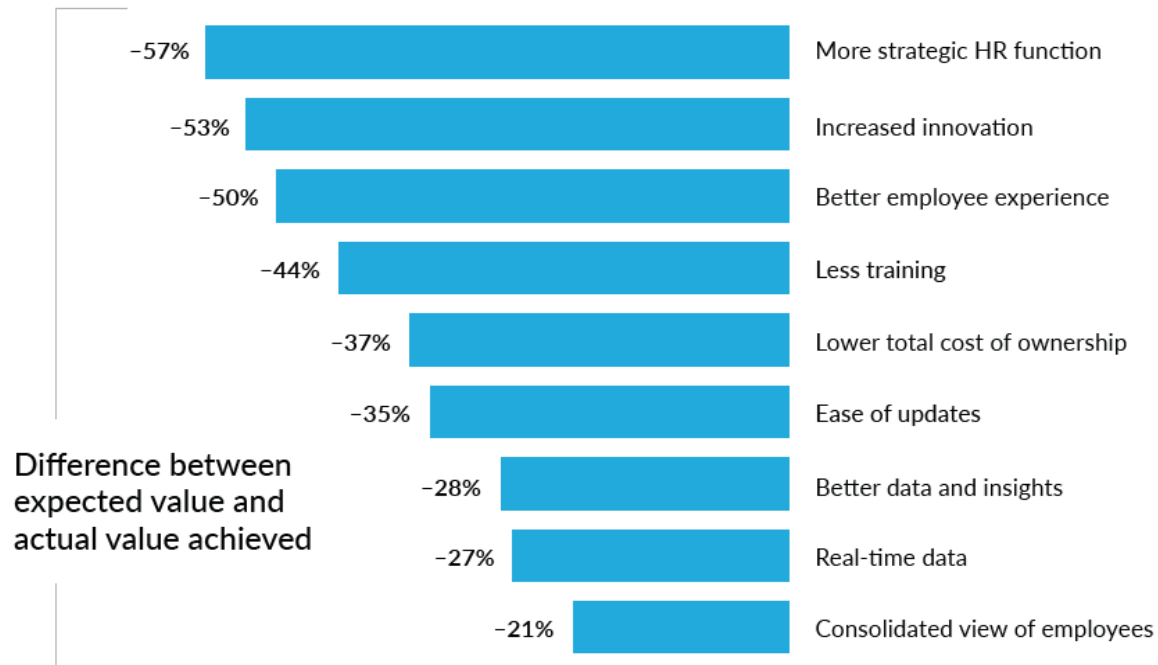*Josh Bersin Report – The Definitive Guide: HCM Excellence*

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A Gap Between Expectations and Reality

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Source: 2019 *Deloitte Human Capital Trends* and August 2019 Bersin proprietary research, n=801

Josh Bersin Report – The Definitive Guide: HCM Excellence

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
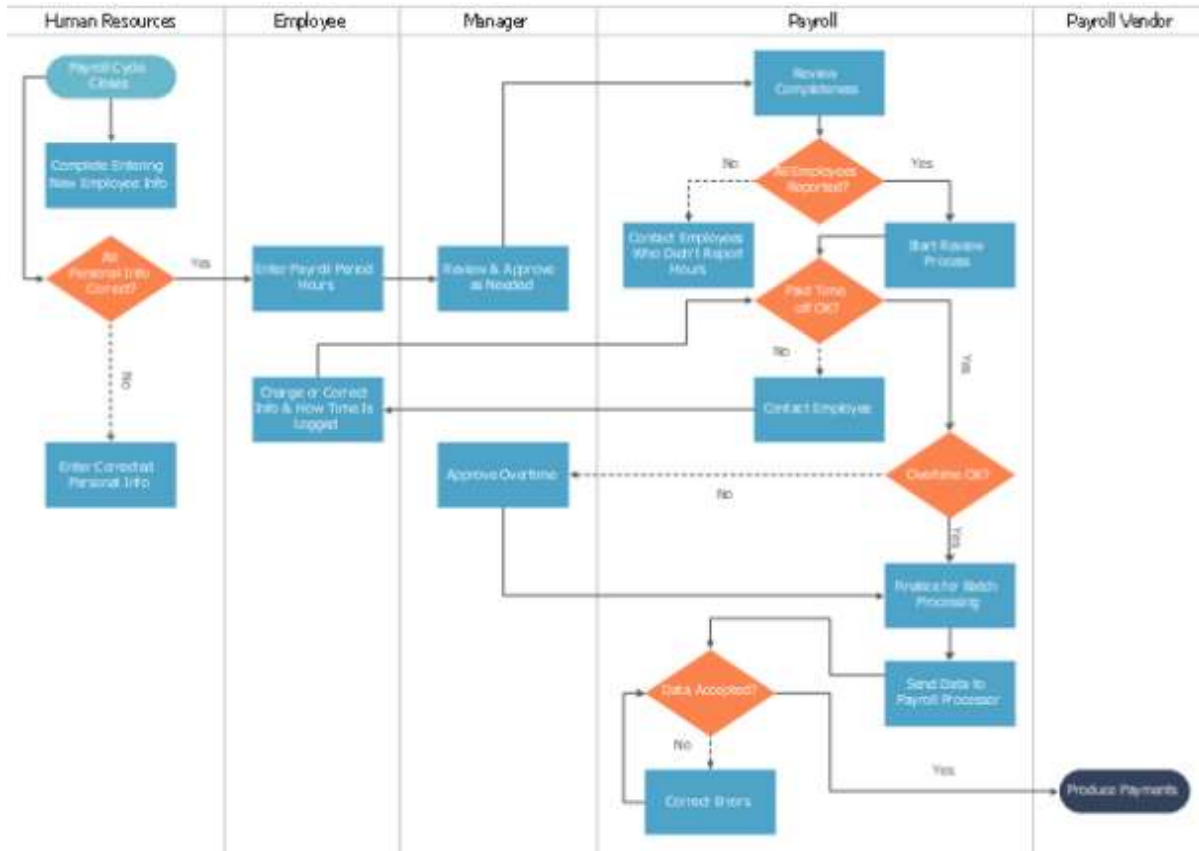
https://www.conceptdraw.com/examples/payroll-business-process

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
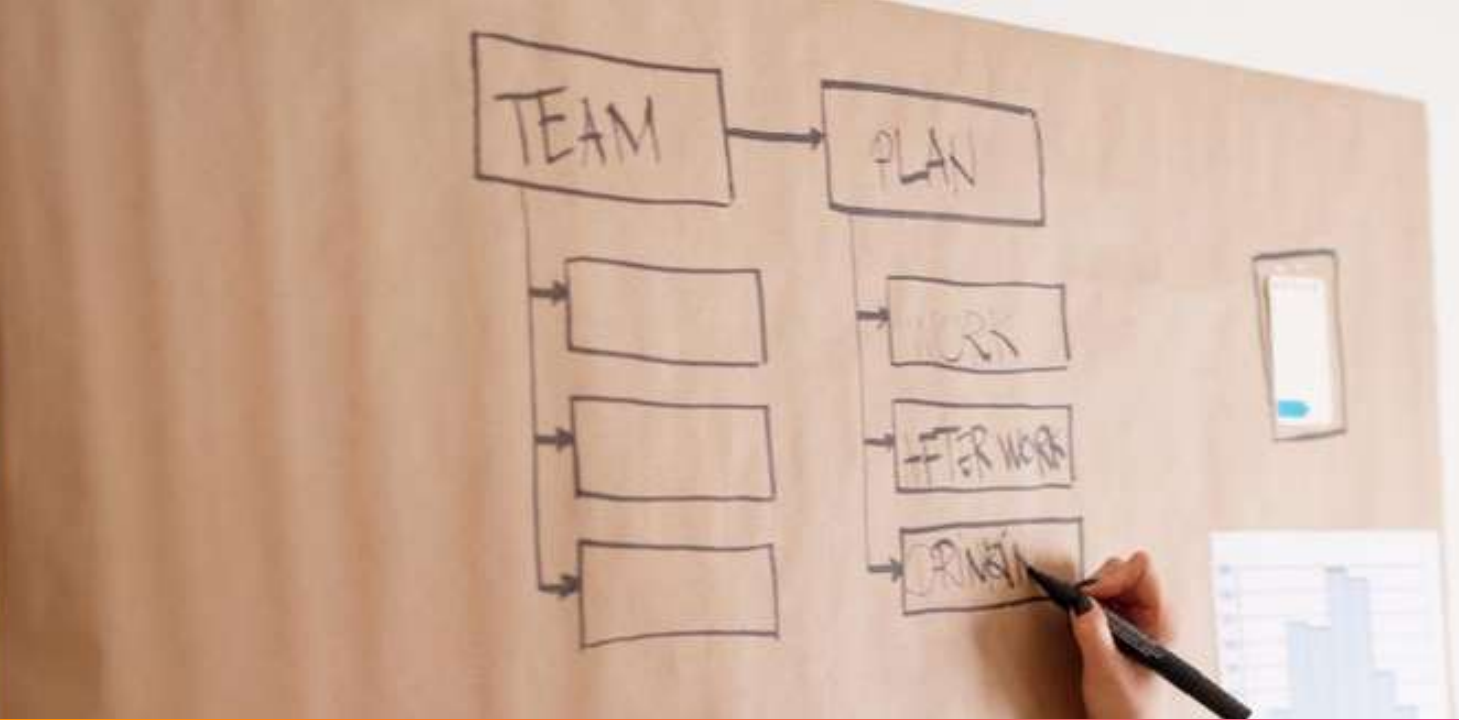
Create a vision

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

Research vendor options

- **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

- 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

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.

Schedule an introduction and needs analysis meeting. Share your current and future state visions with them.

Demonstration meetings with vendors: keep your vision in mind!

Ask for unbundled pricing so you can evaluate every line item.

Create a spreadsheet comparing implementation, ongoing, and annual costs.

Evaluate pricing and contract terms.

Ask additional questions:
(What is the service model like? What is the implementation timeline? References?)

Interview/survey your team to come to a decision on finalist(s).

Remember: YOU own how the process goes, not the vendor(s)!

Evaluate vendor options

Exercise: Create a scorecard for your teammates

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

- 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

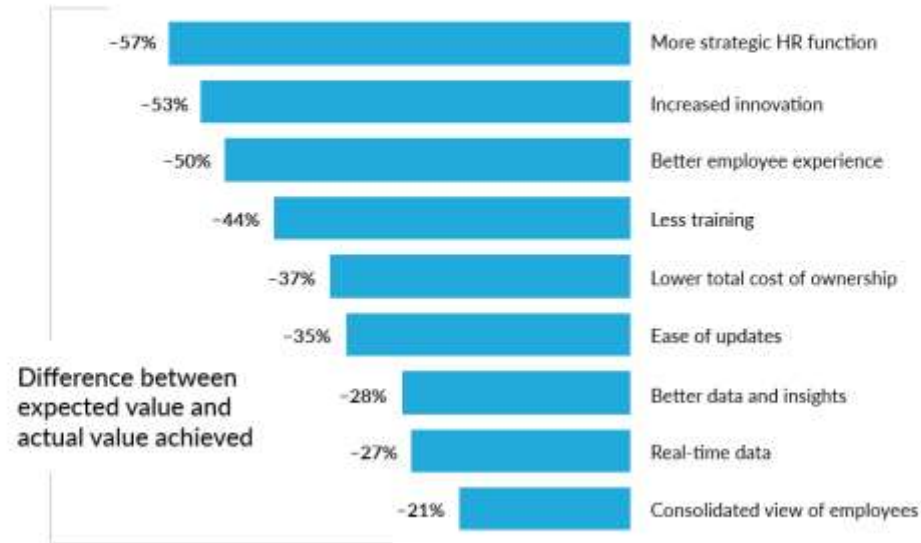# Implementation and change management

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?
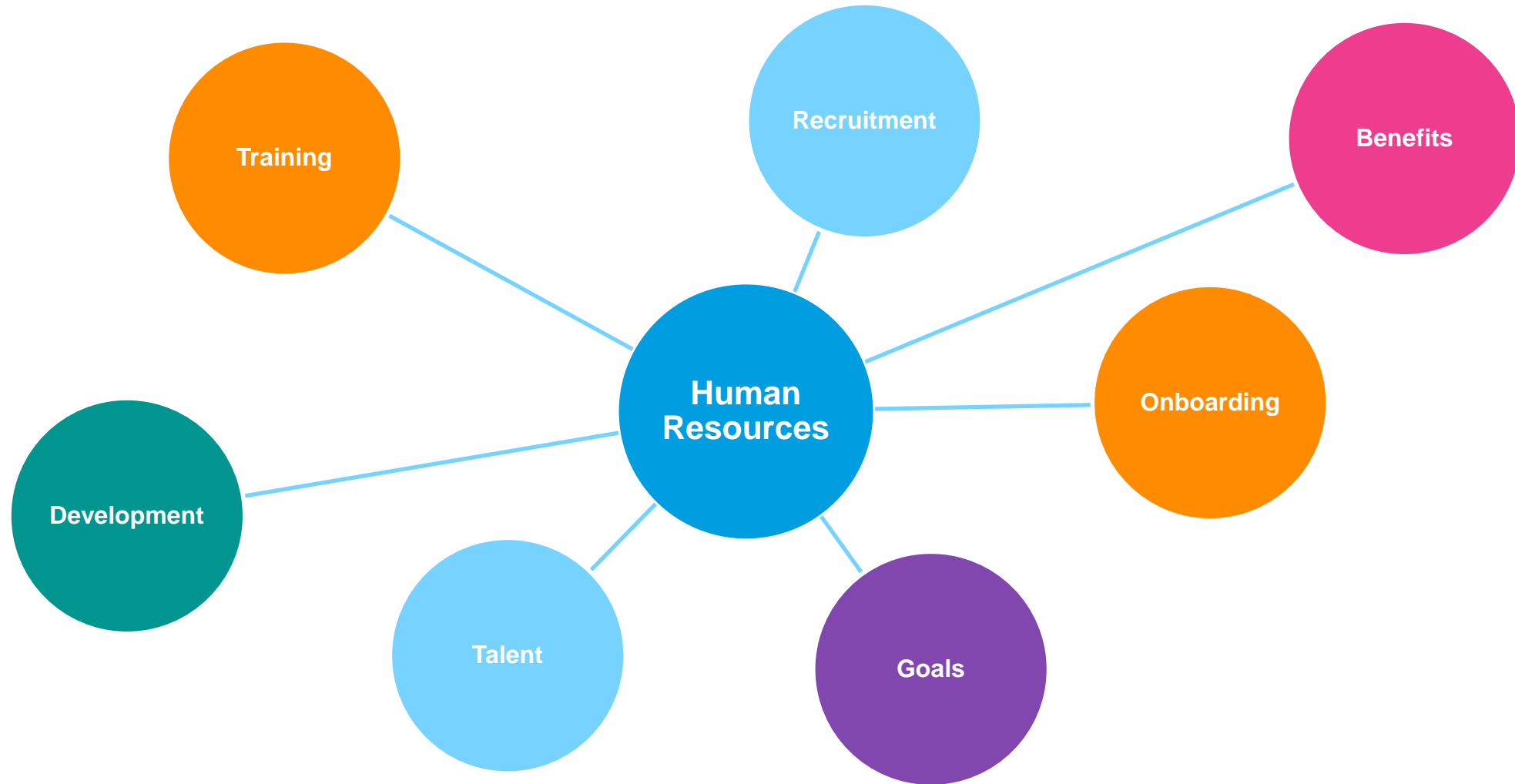
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How do I do it?

- 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?

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