

# 5 Essentials for Making **HR SERVICE DELIVERY** Look & Feel *Effortless*



Dancing  
WITH HR Stars



**Dovetail**  
SOFTWARE

# 5 Essentials for Making **HR SERVICE DELIVERY** Look & Feel *Effortless*

Top performers – *be it in art, sports, acting, music, or dancing* – fascinate us. They make something extraordinarily difficult seem effortless, and we just want to watch them.

ABC has used this concept to produce many successful seasons of *Dancing with the Stars (DWTS)*. The reality show pairs celebrity non-dancers with professional dancers and then airs the pairs collaborating on, choreographing and practicing their dance programs for weeks all to deliver seemingly effortless performances in front of several judges and an audience. The judges offer the dancers tips for improving their performances and eliminate pairs until they are down to the winning performers at the end of each season.

Similarly, building an employee community and executing seemingly effortless HR service delivery requires a carefully choreographed process, collaboration and practice. If done correctly, handling thousands of employee requests, effectively communicating with your employees, and being able to quickly provide reports detailing your HR team's performance to your leadership team should all appear... *effortless.*

Fortunately, unlike in DWTS, **you can leverage technology to support your HR service delivery performance** and in addition to looking effortless, it can actually feel effortless. But in order to be a top performer, you need the right technology mix, a solid implementation process, and the ability to measure and improve your performance over time.

In this whitepaper, our expert judges will offer you 5 essentials for ensuring your **HR SERVICE DELIVERY PERFORMANCE** looks and feels effortless while hitting on all the technical marks necessary for your HR team to give a **winning performance.**



# 1



## Understanding Shared Services And Adopting A True Shared Services Delivery Model

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Just as a dance's choreography is the framework for the entire performance and paramount to its success, your service delivery model is an essential part of your HR service delivery performance, and it's very important to get it right. Adopting a shared services delivery model and supporting it with the right processes and technology will certainly enhance your HR service delivery performance. However, before adopting a shared services delivery model, it is essential to really understand what shared services means.

The shared services delivery concept has been around for over 20 years, starting in finance and quickly expanding into other functional domains. My shared services experience, which began in 1994, is in human resources.

Yet as long as it has been around I still get the occasional question: What is shared services? Actually, it's a very good question. Like so many business concepts, shared services has morphed over time to the point that the answer depends upon who you ask. Indeed, in practical application, it's difficult to distinguish between shared services and simple centralization. Is there really a difference, or have we bastardized the term so much that we should just do away with it entirely?

*Perhaps the most telling sign that a centralized function is not shared services by my definition is the technology it deploys.*

I think the shared services model does deserve a distinct definition. Here's my definition:

1. **Centralized accountability for clearly defined delivery outcomes.** Centralized accountability does not necessarily mean physical centralization. Shared services can be totally decentralized in physical terms as long as the accountability (i.e., reporting) is centralized. Nor can the scope of accountability be loosely defined. A shared services organization must be clear about what it is responsible to deliver. The scope of delivery must be expressed, or at least be able to be expressed, as delivered outcomes.
2. **Delivery across multiple HR domains.** A centralized payroll administration function is not shared services. It's centralized payroll. Likewise, a stand-alone contact center is not shared services. It's a contact center. How many HR domains are required to qualify as shared services? I like to think of shared services as the "delivery center of expertise" within HR, meaning that it handles the delivery aspect of multiple, if not all, HR functions. This, in turn, enables the other HR functions to focus on their valued role, such as strategy, design, thought leadership, management consultation, etc.

# Understanding Shared Services And Adopting A True Shared Services Delivery Model

3. **Managed like a business.** This is where most organizations fall short of my definition. As a rule of thumb, ask yourself if you decided to sell your shared services on the outside market, what you would have to do differently. What mechanisms would you need to put in place to measure how and what you're doing and remain competitive?

For example:

- Can you quantify your work?
- Do you understand the nature of demand for your work?
- Do you know your competition (internal and external)?
- Do you have a strategy for beating them?
- Can you account for the cost and quality of your services?
- Do you have plans to improve them?
- Are you prepared to invest \$1 to make \$2?

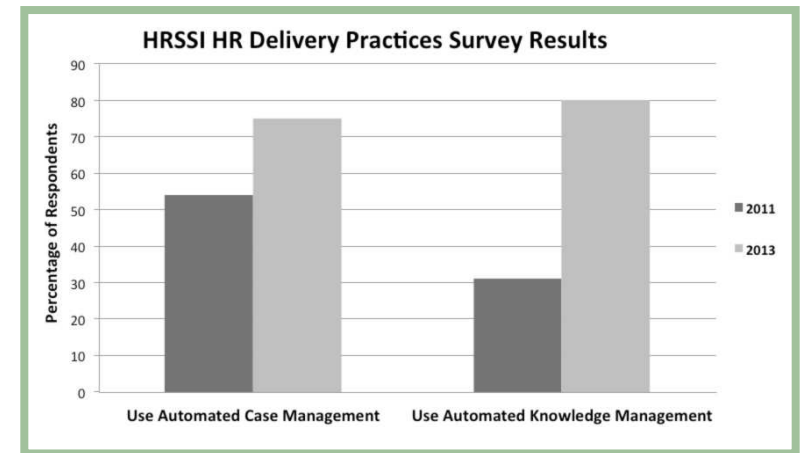
Perhaps the most telling sign that a centralized function is not shared services by my definition is the technology it deploys. Operations that do not leverage tools like automated case management, knowledge management, business process management, self service and telephony automation would have a difficult time competing on the open market, and thus are not being run like a business.

In this arena there are signs of improvement. The Human Resources Shared Services Institute (HRSSI) conducts an annual survey of HR delivery practices. In the 2013 HR Shared Services Practices Survey, 25% of respondents with existing shared services models said they do not currently use automated case management and only 20% reported not using an automated knowledge base tool. By comparison, in 2011 (two years ago) 46% of the survey population did not use a case management tool and a whopping 69% did not use an automated knowledge base tool. This trend seems to be continuing, as nearly 40% of the 2013 survey population either implemented these platforms in the last 12 months or plan to in the next 12 months (see Figure 1:1).

Clearly, the advent of new and more affordable market alternatives has allowed more shared services models to manage in a more business-like manner, becoming shared services in the true sense of the word.

Using the true definition of shared services, operating a shared services delivery model and supporting it with the right technology will absolutely improve your HR service delivery performance and contribute to making it look and feel effortless.

Figure 1:1



# 2



## A Successful Business Process That Supports Technology And User Adoption

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Jim is absolutely right. To be successful at a shared services delivery model and certainly to make HR Service Delivery look and feel effortless, technology is a huge component. But much bigger still is how your organization uses that technology.

Like any other tool or process, the value of your new system will be measured by the users, and that means everything must be done with an eye toward adoption. A great system that is poorly adopted does little to improve your business. There are steps you can take from the beginning to make sure your platform is built with the end user in mind.

1. **Start at the beginning:** This probably seems intuitive, but is too often left out of planning. Before you can decide where you are going, you have to understand where you are! So what does your current state look like, and why are you trying to change it? And, just as important, who really cares?

Simple tools like a Stakeholder Analysis and SWOT analysis can help you answer these questions. In the end, you need to understand not where you are looking to improve, but why it's important, whom it's likely to affect, and what you need to do to make sure they are on your side. Great implementations are built upon great change management work. Understanding the current state is the critical first step.

2. **Successfully Execute:** Having the end state in mind is a great start, but it is just that: a start. The real work comes from delivering on those goals and expectations. While every project will have its own special challenges, there are a few things that, if done consistently, will greatly enhance your chances of success.

### *Define success*

The most underestimated danger in running a project is scope creep. Continually changing targets, expectations, boundaries and goals are almost guaranteed to ensure you will fail by some measure. Fortunately, good documentation and a few questions can help you avoid falling into this trap.

To start, find out from the project sponsor how they will determine when you are done and if your work was a success. Keep asking until you can define a set of measurable outcomes, and then document them in your project charter. You should also document the timeline, budget, metrics, team members and team roles in the charter, just to ensure everyone is clear on the task the team is facing.

*Those who avoid the change are often pursuing a path of least pain for themselves. Find them, embrace them, and ask for their help in making your deliverable even better.*

# A Successful Business Process That Supports Technology And User Adoption

## *Define key roles*

One of the great challenges of running any project is figuring out who does what. A RACI chart is a great tool to help you get your team priorities and activities in line.

RACI is an acronym for the different levels of engagement in any project activity (see Figure 1:2).

This is useful not just for your implementation work, but also for your process overall. Clear lines of responsibility from start to finish will do wonders for making sure the work is done!

## *Watch for Outliers*

When rebuilding a process, there is always fear of the pockets of resistance that don't adopt the new tool or method. Too often, resources are spent in trying to convince laggards of the need to change and adapt. Instead, pay attention to the reason they are resistant.

Process change should deliver an improved user experience, better return on effort, and an end result that the customer appreciates. Adoption issues usually mean you have missed on at least one of these things. Those who avoid the change are often pursuing a path of least pain for themselves. Find them, embrace them, and ask for their help in making your deliverable even better.

3. **Drive Through the Finish Line:** Projects end. It's part of what defines them as projects. And someday, your implementation will end (though it may not always feel that way). That is not to say, though, that the new software or process you've defined can be ignored. Instead, you must plan for future success while working in the present.

The most important task that must be completed before your project is complete is defining long-term system ownership. Software, more than any other tool, is constantly evolving and providing new capabilities. These usually come at a cost, though, especially in terms of time and data. If your system is to provide you with great value, and your users with a great experience, you must know who will own the task of keeping up with the latest news and release notes.

Software vendors work hard to provide customers with improvements and enhancements in their product. Keeping them informed and in touch will ensure you get the most out of your investment over the life of the tool.

Just as costumes, choreography, and music are important elements of dancers' performances, the technology you choose to support your HR service delivery model is important, but the people and processes behind it are essential to your success.

Figure 1:2

**R** – Responsible to perform the task  
**A** – Accountable for the task being completed (there can be only one of these per task!)  
**C** – Consulted with prior to the activity being performed  
**I** – Informed that the task has been completed

# 3



## Employee Self-Service With Real-Time Access To Essential Information

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There's no question that self-service is a key component of successful HR service delivery. As CedarCrestone points out in its 2012 – 2013 HR Systems Survey, "A shared services delivery model that combines self-service and an HR Help Desk delivers the highest level of efficiency to enterprises." Essential to a solid performance is ensuring your self-service is accomplishing its objective.

If we had front row seats to witness a highly effective online interaction between your HR service delivery team and employees, what would the performance look like? What is the equivalent of an encore-worthy performance? To answer this, we need to address the following challenges as it relates to providing real-time access to essential information:

- Clarifying where employees should go to get answers to their questions.
- Eliminating frustration with too many URLs, user IDs and overly complicated systems that do not work well together (if at all).
- Busting silos of business processes that are only partially automated.
- Including collaboration in day-to-day work process.
- Ensuring key metrics are available to support decision making.
- Getting rid of the "Groundhog Day" effect where knowledge shared is lost and continually reintroduced.

In order to create highly efficient and very rewarding HR Service Delivery interactions, consider these fundamentals in your approach:

### 1. **Unified: Taking the guess-work out of it.**

Deploy a unified employee gateway that delivers the right information, analytics, metrics, processes, consultation from within one consolidated web-based environment – 1 URL, 1 set of login credentials, regardless of what role, location or type of employee (i.e. permanent or contingent). Leverage this unified environment to deliver everything an employee needs such as access to their self-service tools (i.e. pay statements, income verification letters, schedules etc.), company communications, key performance metrics, employee social networks and real-time collaboration.

*Deploy a unified employee gateway that delivers the right information, analytics, metrics, processes, consultation from within one consolidated web-based environment.*



# Employee Self-Service With Real-Time Access To Essential Information

## 2. **Web-Familiar: Keep it Simple.**

Deliver an easy-to-use, web-familiar employee experience. One of the greatest barriers to adoption is overly complicated technology environments. If the system is easy to use, employees will be much more likely to find answers to their own questions and/or use the online collaboration features to get automatically routed to the right expert – a more timely and cost-effective solution than traditional phone and email methods. Keep the complexity behind the curtain through the use of sophisticated system integrations and single sign-on technologies.

## 3. **Robust Self-Service: Next Generation Processes.**

Unlike traditional HRMS approaches, effective self-service isn't just concerned with updating the payroll system. Next Generation self-service delivers:

- End-to-End Automation: No need to login to multiple systems and/or complete paperwork outside the system. True efficiency gains come from automating all points of the work process – across roles, systems, languages and operating jurisdictions.
- A Highly Configurable Environment: Delivers role-sensitive work processes configured to the business – not the technology.
- Expert and Knowledge-Infused Processes: Expert and user-contributed knowledge are embedded right into the specific process, program, project or communications. This contrasts markedly from the common approach where employee support is available outside of the system – leaving the employee to their own devices as they attempt to locate someone with knowledge on a particular topic.

## 4. **Knowledge Base: User-Generated, Ever Evolving Knowledge Base.**

Leverage embedded real-time expert chat capabilities and integrated case management software to field inbound employee requests live in the system as they are doing their work. Front-line responders can search an integrated knowledge base to deliver accurate, consistent answers. Private expert chat rooms enable HR Service Delivery groups to share ideas real-time in the system. Practitioners can publish real-time consultations back into the knowledge base to support enhanced service delivery.

## 5. **Continuous Process Improvement: Staying Agile.**

Take advantage of real-time employee ratings, comments, feedback embedded on specific processes, programs and communications to foster a continuous process improvement culture. After all, sometimes it takes a bit of practice to get the choreography right.

# 4



## Ability To Measure Performance And Identify Areas For Improvement

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Continuous improvement is paramount to the success of a dancing pair on DWTS. Each week dancing duos are provided with feedback and make adjustments to improve their performances and avoid exiting stage left the next time.

Similarly, as Cary mentioned, continuous improvement is essential for successful HR service delivery. When it comes to applying continuous improvement within an HR Shared Services environment, I tend to favor the Six Sigma approach, where the DMAIC methodology fits well (Define, Measure, Analyze, Improve, and Control).

Applying the DMAIC methods to the notion of improving HR Service Delivery within an HR Shared Services environment could look like this:

1. **Define the HR Service Delivery Catalog:** The first step in any improvement is to understand your current state. What services are you offering, who is your customer, what business value are you trying to deliver?

A typical step when implementing an HR Shared Service Center (HRSSC) is to build a Service Catalog. The Catalog consists of all services being offered to the employees by the HR SSC. Some high level examples of services might be: Sourcing and Recruiting, Reward, Relocation, Onboarding, Employee Exit, Training Requests and the HR Help Desk service.

A vital step is to translate each service activity into Customer Value Statements that convey the real meaning of the service in laymen's terms. An example of value statements for the HR Help Desk service could be, "Multi-tiered, accurate, consistent, and within agreed Service Level Agreements (SLAs) information and guidance on all employee and manager HR related enquiries." Once you have created the value statements you are then ready to define specific measurements applicable to them.

2. **Measure the value being provided by the HR Service Delivery:** With value statements in hand, defining relevant measurements to monitor the service delivery is step two. Taking the earlier example of the HR Help Desk service we could define measurements such as:

- Self-Service adoption (Tier 0)
- Self-Service Knowledge Base usage (see Figure 1:3)

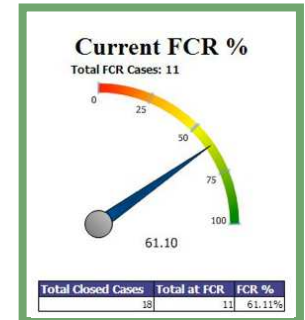
Figure 1:3



# Ability To Measure Performance And Identify Areas For Improvement

- Calls answered and resolved at the Service Center within the first interaction, typically referred to as First Call Resolution or FCR (see Figure 1:4)
- Consistency in answers provided to Bounce Rates, where employees shop for different answers
- Cases resolved within and outside of agreed SLA's
- Other HR Shared Service Center Services
- How many calls are being handled that originate from another service provided by the HRSSC
- Customer Satisfaction Surveys

Figure 1:4



At this stage it is quite clear to see that sophisticated HR Help Desk software is required, not only to measure the results, but also to analyze them.

3. **Analyze the results:** As mentioned in the previous step, a well-rounded and dedicated HR Case Management tool will provide rich analysis tools to further allow the investigation and trending of the measurements in place. Where breaks in the process are identified, root cause analysis or cause and effect analysis should be employed. Examples of analysis could be:
  - **Trending** – over a three-to-six-month period the number of priority one calls raised, and not resolved within the agreed SLA.
  - **Process bottlenecks** – transaction workflow within the HRSSC for various services can be monitored and tracked to identify bottlenecks.
  - **Process wastage** – where unnecessary steps take place within a process, and where new enhancements to the process, such as automation may make sense.
4. **Improve or optimize the current process, where sensible:** At step four, it is necessary to note the sensible clause. Think of practicality when making improvements or optimizing areas of the service delivery. The need to answer all calls within 10 seconds might sound great, but at the cost of heavy additional resources, might not pay off when departmental profits and losses are discussed.

Not only sensible and practical, but iterative is also key. Make iterative improvements that have the biggest impact on overall service delivery. For example, if your HR Help Desk cases logged show a trend of multiple inquiries on HR policies, perhaps unclear to employees and managers, make sure the policy owners are informed and requested to make their own improvements. Valuable insight from the customer voice could lead to fostering the business case for HR technology improvements.

5. **Control and monitor continuously, do not veer away from the goal of improvement:** Put controls in place to keep service delivery on track and to a high standard. Continuous improvement plans work best as an iterative approach, where small improvements are made with regular frequency. Transparent service delivery helps accomplish this. If you have the right technology and confidence to publish, automatically of course, your service delivery results to your business then make it happen. This style of transparency typically improves morale, competition and a sense of fulfillment.

# 5



## Social Collaboration Tools Employees Can Use In Their Day-To-Day Work

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A great dance performance doesn't just entail getting all the steps right, it's also about how engaged, connected and comfortable dancers are with their partners and the audience. Similarly, to get HR Service Delivery right, it's essential your employees and your HR team are engaged, connected and comfortable communicating with each other. Compelling and engaging by nature, social collaboration tools provide natural channels for improving collaboration and adoption of self-service, setting up the perfect opportunity to take service delivery to the next level.

Social tools in the workplace not only change the game when it comes to employee engagement and collaboration, but they can be a real driver in productivity. These are some of the basic underpinnings of how they can work in support of a solid HR service delivery model:

1. **Creating Online Personalities:** Most people today are experienced with online profiles through business purposed applications like LinkedIn. Taking this concept inside the organization, talent profiles create a "presence" that is inviting and create a more personal environment within which shared services and their customers can interact (see Figure 1:5).
2. **Providing Online Channels to Foster Discussion and Feedback:** Community forums are unbeatable at creating and maintaining open dialogue and also providing a natural gateway to resource materials. Whether employees simply want to review relevant posts or participate by sharing knowledge, forums provide a logical and organized way to bring people and information together.
3. **Sharing the Wisdom of the Crowd:** While the expert "judge" may provide a critical view, tapping into the wisdom of the crowd provides an opportunity to view things from the peer perspective. Tools such as rating and tagging content are not only valuable by surfacing information in the most relevant fashion, they are also empowering for employees to provide their point of view and, often, leads to continued improvement of information over time.

*We live in a time where people expect they will "stay connected" to the people and information that is important to them.*

# Social Collaboration Tools Employees Can Use In Their Day-To-Day Work

4. **Developing more than a Content Repository – an Interactive Experience:** Today, learning can occur in a variety of non-traditional, interactive and entertaining ways. For example, the company's CEO can “walk out” onto a computer screen and share a video-recorded message to welcome employees to the company or explain an important company initiative. Like never before, this type of interactive, rich content provides a personal approach that enhances the overall experience.
5. **Adding the Human Touch:** We live in a time where people expect they will “stay connected” to the people and information that is important to them. Leveraging tools such as live chat, and embedding them right into HR processes for that just-in-time experience, can allow for confidential communication between HR reps and employees. The result is a trusted one-on-one exchange, and that constant awareness and helping hand is only a click away.

Figure 1:5



# The *Results*

**Before hitting the dance floor,** all of the details are considered – the costumes, hair, make-up, lighting, music, choreography, timing and many other details. Dancers practice, collaborate and concentrate on getting all these elements right. When it all comes together, the result is awesome – it provides a captivating display of amazing talent that looks completely effortless.

HR service delivery is similar. **It requires collaboration, teamwork, knowing the essential elements and practice to get all the details right.** When an HR organization does it well, the result is HR service delivery that looks and feels effortless – captivating your audience and earning you high marks for your performance.



## About Dovetail

Dovetail Software delivers SaaS HR case management and service delivery solutions that manage and track employee interactions with HR – including employee grievances and general policy questions, payroll and benefits, recruiting-related questions and compliance issues. Dovetail customers cite cost reduction of supplying support, increased productivity, access to complete records of employee interactions with HR, and visibility into analytics that help them improve their processes as key product benefits.

Contact Dovetail today to find out how we can help you improve employee satisfaction, decrease risk, and benefit from significant cost savings. For more information, visit [www.dovetailsoftware.com](http://www.dovetailsoftware.com).

## About cfactor

Since its inception, cfactor has been recognized by organizations like Ernst & Young, the Canadian Innovation Exchange and the Business Development Bank of Canada for its game-changing workforce management, talent management and performance management enterprise software. Working primarily with mid-to-large enterprises that represent hundreds of thousands of employees across a variety of industries, cfactor consistently delivers social enterprise products that are highly configurable, improve employee performance and deliver a proven ROI. For further information, visit [www.cfactorworks.com](http://www.cfactorworks.com).

