HRMS SELF-SERVICE
6 STEPS TO SUCCESS

A comprehensive guide to selecting and implementing HR self-service

GUIDE HIGHLIGHTS

Carrying out a self-service requirements analysis

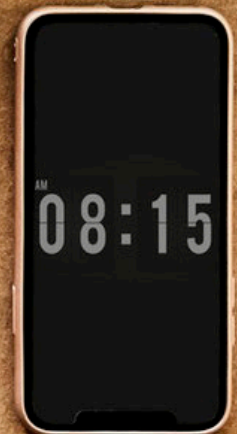Achieving user buy-in during implementation

Implementation template to help organize your project

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"On the face of it, this is a large undertaking for a company of any size, but in the end the benefits usually outweigh the implementation costs."

Whether your company is an SME employing 20 staff or a global conglomerate with employees numbering in the thousands, the benefits of an HRMS with self-service functionality are extensive. However, as with any enterprise software implementation, self-service functionality is not as simple as 'plug and play'.

In order to achieve success with HRMS self-service, your company must understand its advantages and limitations, requirements and functions, and ultimately, the compatibility of self-service with your HR department and business as a whole. A self-service HRMS will open up data and processes to employees company-wide, resulting in a need for in-depth process analysis, mass user adoption and training. On the face of it, this is a large undertaking for a company of any size, but in the end the benefits usually outweigh the implementation costs.

This whitepaper addresses all areas of HRMS self-service; defining the benefits, developing selection and implementation strategies, achieving employee and manager engagement as well as planning user training. Together, these form the ultimate 6 step guide to HRMS self-service success.

IDENTIFY DESIRED HR SELF-SERVICE OUTCOMES

Technology is all about streamlining procedures, saving time and achieving more with fewer resources. When it comes to the endless detailed queries our employees have about terms, conditions, salary, leave entitlement, and so on, the days of turning to the HR department for answers are almost done.

"The rise of HRMS and payroll systems with self-service functionality have largely removed the HR middle-man"

The continuing rise of automated HRMS and payroll systems with self-service functionality have largely removed the HR middle-man/woman, giving the employee direct access to their personal records. In a real sense, this is a process of devolving the HR helpdesk function to the people asking the questions.

You may question whether self-service is a necessary function given your business needs and existing HR setup. The first step toward answering that question is to understand the benefits associated with adopting HRMS self-service and how they relate to your HR processes.

FASTER AND MORE ACCURATE HR ADMINISTRATIVE PRACTICES

When implemented successfully, HRMS self-service is rolled out with mobile technology in mind. Anytime, anywhere access is convenient and will increase usage of HRMS self-service functions because they offering users genuinely helpful tools.

Booking flights for your next vacation and need to check your available paid time off allowance? Easily done. Working on your household finances after dinner and need to check your last few payslips? No problem.

REDUCTION OF ADMINISTRATIVE COSTS

Self-service in itself is not typically a significant expense and is often bundled with complete HRMS packages.

Every time an employee or manager uses their direct access to answer a question they'd otherwise

ask a member of the HR team, time is saved and productivity - of the enquiring employee and the HR team - is increased. Time is money and, sooner or later, real and measurable savings will emerge will in the HR administrative overheads.

Knowing the organizational priorities upfront as they apply to payroll provides a clear framework to the review process. Consider the wider picture, including budgets, other ongoing organizational change projects, relevant legislation and your overarching business goals.

GREATER EMPLOYEE SATISFACTION

If you measure employee engagement and satisfaction, HRMS self-service should have a beneficial impact, at least in terms of employee opinion on the available support services.

Easy access to information such as benefits packages, open enrollment, or even pensions statements – all issues that tie up HR staff with lengthy and/or complicated inquiries – leads to less frustration with the HR department and a better-informed workforce. What's more, it tends to result in more accurate records being kept; when each individual is responsible for their own employee record, mistakes and errors become far less common.

A MORE STRATEGIC HR FUNCTION

A common cry from HR is that it does not have a strategic role in the organization; that compliance work and administration divert resources away from more strategic, longer-term issues. HRMS self-service frees up HR resources, allowing the HR team to focus on becoming the strategic partner to the business it always wanted to be.

Your HR team could dedicate more time to recruitment strategy, for example, or to implementing processes to react to the people analytics data modern HRMS can provide. Freeing up their time

While every business is different, and not all benefits of self-service will be applicable to all businesses, enhanced accessibility to admin data and reduced costs are positives we can all agree on.

CARRY OUT A SELF-SERVICE REQUIREMENTS ANALYSIS

You may be sold on the potential benefits of incorporating more self-service functions into your new HRMS but before you can start enjoying the pay-off you have to conduct a thorough requirements analysis to inform your HRMS selection process.

Of course, the usual software selection questions still apply – anticipated benefits, cost savings, technical requirements, etc. – but these are usually answered when talking about the system as a whole. Self-service carries a number of specific issues in its own right.

WHAT DO YOU NEED SELF-SERVICE TO DO?

This is the basic-but-essential requirements question.

There are any number of possible self-service functions for employees, including:

- Personal data maintenance

- Employee communications

- Benefits and open enrollment

- Family status changes

- 401k/pension issues

- Training records

- Leave entitlement

- Online paychecks

- Access to information sources such as the employee directory, HR policies, and organizational/ hierarchical charts.

Decide what you need now and what you might need in a couple of years' time. Then move onto your *nice to have* requirements. Once you've set a budget and developed a more accurate idea of how far that stretches, you can look at vendors who offer these alongside your must-haves.

HOW SECURE DOES HR SELF-SERVICE DATA NEED TO BE?

Any HRMS holds highly sensitive employee information (names, addresses, social security numbers...) but as soon as you introduce the self-service factor, employees become much more aware (and potentially concerned) about how safe that information is.

"One key requirement, should be the ability to set access controls, so that data can only be viewed by those that really need to see it."

One key requirement, therefore, should be the ability to set access controls on your self-service data, so that it can only be viewed by those that really need to see it. Ensure that backup protocols are rigorous, and all data transmitted (especially if you're buying a cloud-based product) is encrypted to appropriate SSL standards. If your potential HRMS vendor can't meet these basic security requirements, it's time to move on.

CAN THIS SYSTEM HELP US REMAIN GDPR COMPLIANT?

The GDPR (General Data Protection Act) comes into force in May 2018.

After this date, you'll need to obey the following regulations surrounding the data you hold on EU citizens, even if you are not based in the EU yourself. Ensure any self-service modules you operate can assist you with:

- Right of access by data subject: Individuals can request to be informed of what you're going to do with their data or even request a record of their personal data you collect

- Right to rectification: Individuals can request you to correct or update their data in your database

- Right to erasure ("right to be forgotten"): Individuals can request you to delete their data from your database - particularly relevant for employees who are leaving.

- Right to restriction of processing: Individuals can request you to suspend their data from being processed in your database.

- Right to data portability: Individuals can request you to export all their data from your database

- Right to object: Individuals can request you to stop processing their data indefinitely.How secure does HR self-service data need to be?

WHAT ARE THE POTENTIAL COST SAVINGS OF HRMS SELF-SERVICE?

That self-service reduces the HR administrative overhead is an accepted benefit.

However, although you could potentially see a 20-25% reduction in time spent on routine HR queries and record-keeping, this will not necessarily translate to staff savings in your business. Many organizations find that the demand for HR resources actually increases because the longer-term impact of self-service is a greater involvement in strategic matters and better quality support for labor-intensive (and costly) functions such as recruitment and performance management. Explore the potential admin savings in detail and where those savings can be redeployed within HR.

The benefits of self-service only accrue when the system is used to its fullest extent. For that to happen you need your employees to not only understand it but also to believe in the value on offer. Some of this is a training issue as part of system implementation. Some of it is attitudinal and can be influenced by your communications strategy, as you introduce the new system. And some of this is about choosing a system in which the user experience is sufficiently familiar that its use is largely intuitive. After all, most employees these days are used to standard interfaces and leveraging this fact will aid navigation and boost system use.

ENSURE EMPLOYEE BUY-IN FOR YOUR NEW SYSTEM

Your new HRMS self-service functions may be state of the art, but if you can't achieve employee buy-in, then they're just expensive window dressing.

The problem is, unless you've replaced your entire HR department with a software solution (highly unlikely and not to be recommended) then there are still HR personnel that employees can approach directly. If for some reason, an employee doesn't trust or understand the self-service platform, then they'll simply fall back on the old way of getting an answer to their inquiry: go see HR.

The secret to avoiding this issue lies in putting employee engagement and buy-in at the heart of the selection and implementation of your HRMS. In addition to user training prior to go-live, there are a number of tactics and factors to leverage to ensure driving up the rate of buy-in.

MAINTAIN CONSTANT COMMUNICATION WITH USERS

Your users are a key stakeholder group.

In fact, they may even be the most powerful stakeholder group. After all, the board have strategic and budgetary control but it's the employees who choose to use the system or not. Involve them from the start with bulletins, newsletters, focus groups, etc.

Emphasize the benefits of HRMS self-service - like instant access to benefits plans and time-off requests - while inviting them to flag up potential problems. Importantly, solve those problems and let users know what you have done to improve things for them.

IMPLEMENT FAMILIAR AND USER-FRIENDLY INTERFACES

Your HRMS system's functionality may be cutting edge but the user experience – what they see on-screen – shouldn't be too strange or new. Perceived familiarity is a significant factor in people's adoption of the new HRMS and boosts employee buy-in by clothing new functions in old appearances.

This doesn't mean your shiny new system needs to look like it's been dredged from the depths of the 90s, or mirror your legacy system in every way possible. You could also consider HRMS with mobile-influenced interfaces to increase familiarity, for example.

MOTIVATE USERS TO ENGAGE WITH THE NEW SYSTEM

This is the 'carrot' to the good, old-fashioned 'carrot and stick' approach.

If the system is rolling out on a large enough scale, you might offer tangible incentives to encourage employee buy-in. For example, a prize draw (store vouchers, extra paid time off) that includes everyone who accesses a particular function, such as benefits enrollment, is a good way to incentivize engagement with the new system.

You could also consider creating a points-based system for those completing e-learning modules, with leaders being rewarded with a cash bonus at the end of a set period.

REDUCE HR HELPDESK SERVICES

One way of preventing people sliding back into calling their 'HR buddy' instead of learning to use the HRMS self-service system is to remove access to the old ways of doing things.

Change HR's phone numbers - or get rid of the helpdesk entirely. Communicate HR's role changes. Channel all calls to a temporary helpdesk that talks people through the new system (i.e. enables and encourages them to use self-service).

ENCOURAGE EMPLOYEES TO ENCOURAGE EMPLOYEES

In any workforce, some employees will drag their feet and be reluctant to use the new system, while others will be enthusiastic early adopters. Ask these enthusiasts to be your 'on-the-shop-floor' ambassadors and coaches. They can perform a valuable role in assisting colleagues with system use and gathering information on genuine user issues that need to be resolved.

ENGAGE MANAGERS WITH HR SELF-SERVICE

If you want the optimum return on your HRMS self-service investment, you need your managers to be using it as part of their everyday working lives.

As well as accessing, maintaining and utilizing their own personal data, thereby , managers should ideally be leveraging self-service data to help them make more informed and insightful decisions.

Manager self-service can allow managers to:

- Juggle people data and create reports without the need for HR intervention

- Handle more transactions directly – including authorizing pay raises and leave requests

- Be more involved in classic HR functions such as performance management, succession planning and onboarding.

Put simply, self-service should help managers do their jobs more effectively. The key is to encourage your managers to 'self-serve' through providing an informed view of self-service functionality.

TELL MANAGERS WHAT'S IN IT FOR THEM

It's the classic engagement question: what's in it for me? The answer for managers will include:

- Improved accuracy of people data

- Faster transactions and people processes

- Less administrative interaction with HR staff (no offence intended to those in HR)

- Better real-time decisions on matters such as scheduling, and preset alerts

- Reduced overall people management costs (especially compelling for senior managers and leaders with budgetary responsibilities).

All of these offer the manager faster and smarter decision making, plus ultimately, an easier approach to the role.

DEMONSTRATE PERFORMANCE MANAGEMENT IMPROVEMENTS

On a day to day basis, priorities shift, schedules change, rotas are re-shuffled – in other words, your managers are engaged in a constant dance, balancing necessary outcomes and available resources.

Talent management and personnel records options can give those managers much-needed direct access to people data, including location, availability, deployable skills and knowledge, therefore allowing managers much more informed decisions and ultimately more efficient workforce management. In the longer term, the same data combined with compensation data can be folded into better strategic succession planning.

PROVIDE MANAGERS WITH THE RIGHT METRICS

Convince your managers of the value of self-service functions by offering them genuinely useful metrics and measures that demonstrate the ongoing usefulness of the system. The following data should prove that self-service is worth using:

- Track the volume and speed of key transaction types

- Break down the split of time spent on transactions (HR time vs. management time) both before and after the introduction of self-service

- Track HR case volumes (and speed of throughput)

- Compare error rates and data quality pre- and post-implementation

- Quantify where possible the hard cost savings to the organization

INFORM MANAGERS OF WHAT COMES NEXT

Like any technology, HRMS manager self-service does not stand still.

According to a recent Towers Watson HR technology survey, 36% of respondents implemented and leveraged manager self-service in the last 18 months. As new self-service functions become available, engage your management team at all levels in the process of keeping your HRMS up to date. In other words, ask them what new bells and whistles would help them do their jobs and then do something about it.

Managers using a self-service HRMS will encourage peers and subordinates to engage with the system. By providing managers with an informed view of self-service, engagement with the new system should be positive.

TAILOR TRAINING TO YOUR WORKFORCE

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CONDUCT A NEEDS ANALYSIS FOR TRAINING

Thanks to your business case for purchasing an HRMS, you'll have a clear idea of what you want the system to do. In terms of self-service, this list of necessary functions translates directly into a set of requirements for user training.

These requirements will differ between different stakeholder groups (from c-suite to 'shop floor') and the necessary training interventions will also vary according to the differing skills and knowledge gaps.

In other words, you need to conduct a self-service training needs analysis that compares required skills with existing skills.

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DON'T 'SHEEP DIP'

The results of the needs analysis should inform a range of HRMS self-service training options and support to help users bridge their individual knowledge and skills gaps.

The temptation (because it's much, much easier to manage) is to devise a training option that focuses only on self-service features and treats every user as if they had the same level of system knowledge. But each user's starting point will be different and while broad categories of training requirements can be useful, the "easy" option of providing a single mandatory training option will inevitably lead to teaching already knowledgeable users and undermining all your stakeholder engagement work so far.

A variety of training options (maybe even a menu that people can choose from according to their self-identified needs) might include:

- Face-to-face group training

- Individual coaching

- Written guidance

- An e-learning how-to package

- The presence of a team of knowledgeable 'super-users'

- A set of frequently asked questions

- Modular just-in-time information bites

- A help desk to support the system launch

The list is potentially endless – ask your people what would lead to them feeling well-supported.

LOOK FOR AD-HOC TRAINING OPPORTUNITIES

As well as the planned and formal training activities that form a crucial part of your implementation strategy, there are also a myriad of chances for less formal input. If timely, these can boost the credibility of both the self-service project and the system in general.

Create opportunities for feedback: comments and complaints about the early days of the system can offer a valuable steer on where users need extra guidance or training, as well as prompting additional FAQs.

During the transition to HRMS self-service, HR staff should be on the lookout for opportunities to coach employees in the use of the system – just a few extra minutes spent instructing someone on how to handle their own inquiry will save time in the future.

EVALUATE YOUR TRAINING

As with any other training initiative, evaluation is critical. Hopefully, gathering data against preset success measures will prove that your user groups are now highly skilled and using the self-service functionality of your new HRMS.

Equally, the evaluation process will tell you where HRMS self-service training has been insufficient and allow you to rectify the issue. After all, if the strategy hasn't been a complete success, you need to know. A skills failure will lead directly to an adoption failure and, ultimately, a system failure.

If you want users to adopt the self-service functionality of your HRMS you need to ensure they have faith in the system. Through comprehensive tailored training you will develop an informed user base who understand and realize the potential of the system.

FULLY IMPLEMENT YOUR SELF-SERVICE SOLUTION

Knowing your self-service needs, planning how HRMS self-service will hopefully further your strategic business aims, and buying a system that has the potential to give you what you want – all essential steps to benefit from self-service software. However, to state the obvious; buying the right system is only part of the battle, the key to getting the most from your self-service is an implementation process that sets you up for success.

ENGAGE USERS BEFORE IMPLEMENTATION STARTS

Technological factors aside, your HRMS is used by people.

So, pre-implementation, before you even think about flipping the system switch, talk to the people who will use the system as part of their daily working lives. Outline which self-service options will be available and when they will be able to use them. Invite them to provide feedback on this implementation plan and refine the process with this feedback in mind.

AIM FOR A HIGH EARLY ADOPTION RATE

When the system goes live, early adopters – those who embrace the new technology wholeheartedly – are your best ambassadors for system use. Their peers and colleagues see them obtaining a benefit from the new HR portal and become interested in what the system can do for them. Some reports suggest that a majority adoption rate can lead to 75-90% of HR transactions being handled via self-service. Encourage your early adopters and listen to them, they're your ears 'on the ground' in the early stages of implementation.

INTEGRATE SELF-SERVICE INTO YOUR DAY-TO-DAY PROCEDURES

Integration comes in two forms: technological and procedural.

For the first, an HRMS that links and shares data with other business intelligence systems such as payroll, ERP, CRM and so on, offers more potential self-service options (and a better user experience).

On the procedural side, your aim is to have self-service transaction become the normal, standard method of accessing HR information and services. Weaning users off the old methods of accessing HR might take some time, but selling the benefits and, more importantly, the early successes, will help users to view self-service as a fully integrated part of their working practices.

MAKE SELF-SERVICE COMPULSORY (AND MAKE IT EASY)

On a slightly harder note, one effective method for encouraging rapid adoption and successful implementation is to make use of self-service mandatory. Ensure users understand the system and its benefits and make it simple and intuitive to navigate, then take away the old HR access channels; do whatever works to push, as well as pull, your people towards using the new system.

STOCK YOUR HRMS WITH 'GOOD' DATA

Another obvious but essential point: when you migrate your HR data from the old system (a prior HRMS or a set of spreadsheets etc.) take the opportunity to cleanse and improve it so that the initial user experience is as good as it possibly can be. Nothing undermines the new system more (and its self-service functionality) than someone finding their personal record is full of errors and blanks.

HRMS SELF-SERVICE IMPLEMENTATION TEMPLATE

TIMELINE

Schedule your implementation activities in the space provided.

- Training: _____ (date to be completed)

- Testing _____

- Go-live _____

- First round of post go-live user feedback _____

- First evaluation meeting post go-live _____

- Rollout of changes from evaluation and user feedback _____

COMMUNICATION

Three ways you can communicate the changes surrounding HRMS self-service to the wider workforce:

- _____

- _____

- _____

TESTING YOUR NEW SELF-SERVICE SOLUTION

There is no such thing as 'too much testing.' Like any HRMS functionality, you should test your self-service module

Use the space below to make notes, highlight issues and suggest resolutions for each round of testing you complete.

Testing round one - issues: _____
_____
_____
_____

Testing round two - issues: _____
_____
_____
_____

Testing round three - issues: _____
_____
_____
_____

USER FEEDBACK NOTES

As a wider workforce-based function, there's plenty of opportunity to gather user feedback for your self-service module. If it falls short, there will be a queue of people ready to tell you how exactly it is making their working lives more difficult.

Use the space below to make notes on user feedback and map out some suggested improvements:

_____
_____
_____
_____
_____
_____

CREATING A USER TRAINING PROGRAM

The timetable below helps you keep track of when and how your key user groups are being trained. Customize it to your key user groups - some will require more training than others and may respond differently to different types of training.

User group	Method of training	When
E.g: accounts department	E-learning modules	Ongoing. Deadline 18/03
E.g: HR staff	Extended in-depth seminars	21/03

PROJECT EVALUATION

How can you tell whether your self-service implementation has been a success?

The obvious answer is 'people have stopped using the HR team to process basic actions like change of address'. Nevertheless, it helps to have some formal definitions of success in place - both for your benefit and for when senior management come looking for signs that their investment has paid off.

Be ambitious, but don't get carried away. It's better to be realistic from the start than to set self-service up as a cure-all for all of your company's issues, and have to explain yourself when your promised improvements don't materialize.

KPI identification

Use the space below to identify KPIs for the success of your self-service implementation project:

- KPI one: _____

- KPI two: _____

- KPI three: _____

- KPI four: _____

- KPI five: _____

Use this table to organize your project goals and KPIs into an easy-to-follow timeline:

Goal	Target completion date (weeks post implementation)	Complete? (Y/N)
E.g: 75% of workforce complete personal data entry	*3*	*Y*
E.g: complete halt in basic admin enquries to HR	*6*	*N*

"A poorly implemented self-service portal will result in mishandled data, low user adoption and unnecessary expenses"

Whether you have made the decision to implement self-service HRMS or it has been included as part of an overall HRMS purchase, you must now spend time planning and implementing the functionality.

A poorly implemented self-service portal will result in mishandled data, low user adoption and unnecessary expenses. While a successful implementation can speedup manager and employee requests, streamline HR processes and reduce costs.

In the end you have to determine if self-service is right for your company and your HR requirements. If you decide it is, following these 6 steps will prove beneficial in achieving HRMS self-service success.

This guide was written by Dave Foxall, HRMS World Columnist, with contributions from Kathryn Beeson, HRMS World Editor

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