Employee Self-Service: A Strategic Approach

Self-service is no longer a luxury, but has expectantly become a part of our daily routines. We want the power and freedom to do things when we want and we expect self-service to be an effortless user experience. We've come to expect it in stores, gas stations and of course technology. Technology fuels the expectation and acceptance of self-service. With free apps and software solutions downloaded to our personal devices, we begin using these self-service tools with little to no training.

Human Resources is certainly no stranger to employee self-service (ESS) and manager self-service (MSS). Simple HR transactions including updating personal information, direct deposit, managing time-off and benefits administration shifted to self-service long ago for most HR departments. Cloud-based HRMS, applicant tracking and onboarding systems have extended the use of self-service to other segments of talent management. Progressive HR departments are combining self-service with process automation to dramatically reduce the time devoted to administrative tasks for both HR and employees. HR spends far less time on paperwork and manual processes, while employees appreciate the ease and flexibility of being able to submit, update and access documents and information.

Before we begin developing a self-service strategy it's important to look at the dynamics influencing self-service in HR. There are three areas that continue to drive the demand and need for a self-service strategy.

- Changes in the Workforce
- Technology
- HR Transformation

What's driving the need for self-service?

<u>Changes in the Workforce</u>

Millennials take center stage when there is conversation about changes in the workforce and rightfully so. These digital natives represent 35% of the workforce and are the single largest generation in history. They've grown up in a self-service world and they expect to do everything at a moment's notice on a mobile device and Generation X is quickly following in their footsteps. Flexibility has moved to the top of the list of things Millennials look for in a new job and it's no longer looked at as a perk or reward. People want to be able to take a morning off and catch up on work on the weekend. HR must keep up with employee demand around flexibility by deploying technology that can be accessed anytime, anywhere and on any device.

The other shift in the workforce driving the need for self-service is the increase in the number of remote workers. Work is no longer a place we go, it's what we do. Telecommuting, virtual employees and a growing contingent workforce continue to increase the amount of time and number of employees working outside of the traditional office environment. The US Department of Labor estimates about 80% of companies augment their workforce with non-traditional staff including temporary and contract workers who will spend most of their time working remotely. FlexJobs is an online job listing board for telecommuting, flexible schedules and freelance jobs. Based on an analysis of the 30,000 companies in its database from 2014-2015 there has been a 26% increase in jobs posted from companies like Amazon, IBM, ADP, Apple and others. Many of these virtual and contingent employees will have limited access to HR and may not have a company email address. In these situations self-service can help create that digital connection between HR and the remote workforce. The challenges associated with a dispersed or remote workforce is nothing new for global organizations or industries such as grocery, retail, hospitality, manufacturing and service companies. The employees on the shop floor and on the road present similar challenges to a remote worker because access to computers and networks can be very limited.

<u>Technology</u>
Technology is both an enabler and driver of self-service. Based on information from Deloitte and Bloomberg the HR technology market is estimated to be about 15 billion dollars. Most of the new HR technologies are systems of engagement which means they are designed to let employees and managers serve themselves. Design is as important in these systems as features, they must be easy to use and learn so self-service is quickly adopted by users. These systems of engagement must be designed with mobile use first in mind since most people access applications on mobile devices of their own or one issued by their employer. A Gartner analyst predicted by 2018 more than 50% of users will go to a tablet or smartphone first for all online activities. An aggressive prediction but research from IDC and others does show a continuing decline in the number of laptops and PCs being purchased.

Technology, both hardware and software, will continue to increase the demand and availability of self-service.

<u>HR Transformation</u>
If HR departments are to transforms from tactical to strategic they must rethink what they do and of course how they allocate their time. Strategic HR is focused on collaborating with employees to

increase retention, improve the work environment and maximize the mutual benefit of employment for both employee and employer. Tactical HR includes more of the transactional or administrative functions that are a part of every company. Tactical HR includes things like:

- Updating employee training and certifications
- Processing employee paperwork
- Creating & maintaining an employee handbook
- Monitoring and complying with government regulations

All of these functions are important, but for many HR departments they consume far too many resources and self-service has had minimal impact in making these processes more efficient. HR departments are struggling to shift from administrative to strategic and self-service can play a significant role in that shift. Thanks to new technology more and more of the transactional work previously done by HR "Generalists" can be done online through self-service. HR professionals clearly understand the importance of self-service in reducing the time devoted to administrative tasks. According to the most recent Annual Sierra-Cedar HR Systems Survey, service delivery improvements which includes manager and employee self-service, ranked number two on the list of the top nine HR technology initiatives. That same research shows over the next 3 years there will be a steady increase in organizations implementing service delivery technology. It's no surprise self-service combined with process automation is a top initiative for many companies. The cost savings that can be achieved when self-service is adopted by an organization has been covered by a number research groups including Sierra-Cedar, Giga Information Group and Hackett Benchmarking. A 40-60% reduction in the time or cost devoted to administrative work will catch the attention of any executive including those outside of HR. Self-service combined with automation can create an efficient digital workflow between HR, managers and employees to replace the inefficient paper shuffling still found in too many companies.

Other self-service considerations

Now that we've covered why self-service is becoming a requirement for HR let's look at some areas that must be considered when developing a self-service strategy. What are the tactical areas preventing HR professionals from flipping the time allocation pyramid and devoting more of their time to strategic initiatives? The two areas many HR departments are struggling to address that need to be considered when developing a self-service strategy are:

- Monitoring and complying with government and corporate regulations
- Processing and managing employee documents

<u>Monitoring and complying with regulations</u>
Regulations and laws govern every aspect of HR; compensation, recruitment, development and retirement. These regulations and laws are complex and compliance is not getting easier. Companies are finally adjusting to requirements related to the Affordable Care Act and now here comes immigration reform. Proper documentation and recordkeeping has always been the foundation for HR ensuring their organization is in compliance, but with 30-50 unique document types making sure files are complete and up to date is a tough, time consuming job. Self-service in HRMS's , onboarding and applicant tracking systems has led to more and more documents and information sitting in HR technologies never designed with compliance or responding to audits in mind. At a minimum HR needs technology to securely share documents with auditors and litigators, retention management and a way to monitor missing or expired documents.

<u>Processing and managing employee documents</u>
HR departments managing paper employee files spend as much as 65% of their time on transactional and administrative work, a huge drain on resources. On top of the basic paperwork maintenance HR departments must make sure the ongoing activities have the required paperwork.

Certifications, training and annual elections add to the HR workload. HR has to make sure employees and managers are receiving the correct documents and then tracking the return of those documents to ensure they are received on time and are properly executed. To implement an effective self-service strategy companies must eliminate [paper files](#) and drive paper out of all processes. A self-service strategy should help HR departments reduce their dependence on paper, but that isn't always the case. Some solutions offer self-service by giving employees the opportunity to download a form that needs to be completed. The employee is printing a digitally born document, filling it out then handing the paper back to HR. In this approach paper continues to be a burden for HR and the employee. Even in systems where the employee completes documents online if HR has paper-based employee files all too often these electronic documents are printed and added to the paper employee file. HR must have the tools to send electronic documents to employees that can be completed without printing and then filed in a secure digital repository

A strategic approach to self-service

In order for self-service to meet the changing demands of the workforce and HR, it must be integrated into an information management strategy. Progressive HR organizations are implementing automated HR document management systems that integrate employee and manager self-service. This convergence of self-service and document management can eliminate paper employee files and significantly reduce administrative work for HR while improving compliance. The automated HR document management system becomes the central repository for all employee documents and electronic forms. It must have the features to ensure compliant recordkeeping and tools such as secure data rooms to help HR with audits. An automated HR document management system must be able to monitor employee files and when needed distribute and gather required documents. Workflow automation ensures proper routing for approvals or review. The integrated self-service component becomes the mechanism employees use to access forms that are distributed by HR while also giving employees access to their own documents.

The self-service part of the HR document management system must incorporate 7 key elements:

1. **Electronic Forms** – Employees must be able to fill in forms on any device so they don't have to be printed. There must be flexibility to add new electronic forms that might be internal or from government agencies. Rules and regulations change so must the documents employees need to review or sign.
2. **Electronic Signature** – Forms filled in on-screen need to have the ability to be signed on-screen, and the signature mechanism must follow accepted requirements to be legally binding.
3. **Security** – All interactions between HR, employees and managers must be secure, and the HR administrator must have absolute control over who can see what and when. Documents must not leave the central repository, and all activities must be logged and auditable. The system must also support multi-factor authentication to ensure that each user is who they say they are.
4. **Inbox** – Some employees may not have a company email address, but HR will need to send electronic documents to employees for review and signing. The Inbox can replace a company email address allowing employees to securely return documents to HR after signing or reviewing.
5. **Manager Access** – Some employees may not have access to computers or a mobile device so the self-service application needs to be an assisted-service application whereby the manager can facilitate employee access. The manager must be able to connect to the system on behalf of the employee, facilitate the employee creating a secure account, and then be able to hand the employee the tablet or keyboard and let them perform the required tasks.

6. **Mobile Device Support** – Even though an employee may not be provided with a corporate email address or a company device, in this time of 'bring your own device', most individuals have their own smart-phone or tablet. In addition mobile devices are rapidly replacing laptops and PC in most companies. The self-service application needs a convenient path to enable employees to securely use any device including their personal devices. The self-service application must be designed to scale to any screen dimensions (responsive design), and must provide viewing and interaction tools that work securely and efficiently on any network and any device.

7. **Integration** – An automated HR document management system should complement and unify other HR technologies. Key employee information from the HRIS must automatically update the document management system so data like employment status, department, manager, etc. are always in sync with the employee system of record. This information should be passed through to the self-service portal avoiding the need to re-enter information. Integration with onboarding systems, learning management systems and applicant tracking systems enable the HR document management system to become the central repository that monitors all vital documents. Through the integrated self-service feature employees can access documents or information that might have originated in another system. If existing HR technologies offer self-service which is nothing more than downloading forms, these forms should be moved to the automated HR document management system so users can have access to the tools mentioned such as electronic signature.

With an automated [HR document management system](#) and an integrated employee self-service application, the administrative workload for the HR department and employees can be dramatically reduced. The result is that HR resources can be freed up and applied to higher value initiatives. At the same time, the organization can gain control of compliance obligations, and gain confidence that employee information is complete and up to date.

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CERTIFICATIONS AND AFFILIATIONS THAT GO BEYOND THE INDUSTRY STANDARD