



The Key to Strategic HR: Digital Process Manager

The 7 Best Places to Start Automating HR Processes
with UKG HR Service Delivery

Technology has changed the way we communicate, bank, consume information and entertainment, hail a ride, and more. Digitalisation has impacted not only the consumer world, but enterprises as well. The integrated use of analytics, cloud technology, artificial intelligence and machine learning, and other innovative applications is **transforming customer experiences and increasing enterprise productivity and efficiency**.¹ It's no wonder digital remains a top agenda item for most executives.

Innovative digital technologies have enabled organisations to transform their manual, outdated business processes. Every department within an organisation has certain processes designed to achieve certain objectives as efficiently and effectively as possible. HR is no different.

And while it's true that HR processes are still **very manual, document-driven and ripe for digitalisation**, to transform them is often more complex than other business unit processes within your organisation. This is due to the number of systems and stakeholders involved in these processes, the need to deliver personalised experiences, as well as the delicate balancing act HR needs to manage between high touch support and automation.

According to leading industry analyst Josh Bersin, the average number of systems used within HR departments is **eleven**.² An employee lifecycle event, like a promotion, can span across multiple disparate, non-integrated solutions and departments including HR, IT, and finance.

Imagine if instead of replacing all of your legacy systems with new ones to achieve greater efficiency and automation — there's a way for the technology that you already have in place to communicate and integrate in a better way. And by doing this you can re-define your HR processes all together, transforming the way you work and deliver service to your employees.

An HCM solution with integrated HR service delivery technology can **automate and optimise any manual people-based processes** and free your HR team up for more strategic work, while delivering a consumer-level experience to your employees.

Do you want to automate, but don't know where to start? Don't worry. In this whitepaper we'll explore how an HR service delivery solution can help automate processes — and where are the best places to start.

HR Service Delivery — quick wins, big gains

Business leaders cannot afford to ignore digital. Digitally transformed organisations, or “digital leaders,” outperform their lagging peers in terms of gross margin, earnings, and net income.³

Leading digital transformation efforts don't simply replace old systems with new ones, or apply technology to existing processes. Digital transformation requires taking advantage of what's possible with new technology in order to streamline or even reinvent processes. With the pressure to attract and retain top talent, HR professionals have to focus on what's strategic for them and their management. But this remains a challenge given they are still overwhelmed with a huge amount of transactions in terms of workforce administration. Being more efficient in your HR operations, and automating those processes as much as possible will help HR to better manage the specific cases and ultimately position themselves as a **more strategic partner for their organisation**.

By developing Standard Operating Procedures that are supported by and tracked within an HR service delivery solution, HR can manage and prove compliance in case of litigation. By centralising all the tasks of a process — manual or in any of your systems — into one place, you can ensure that each stakeholder performs any actions required to complete the process. The employee experience is also improved due to transparency into the process as well as faster completion times. And with visibility into process performance and completion, you can **identify bottlenecks, discover areas for improvement, and optimise service delivery**. But enough talk, let's see how this can look!



1 Internal Transfer or Promotion

Today, firms around the world are spending billions to attract a diverse workforce and promote cross-culture learning. Research shows that greater workplace diversity leads to greater profitability, customer centricity and **increased employee engagement**.⁴

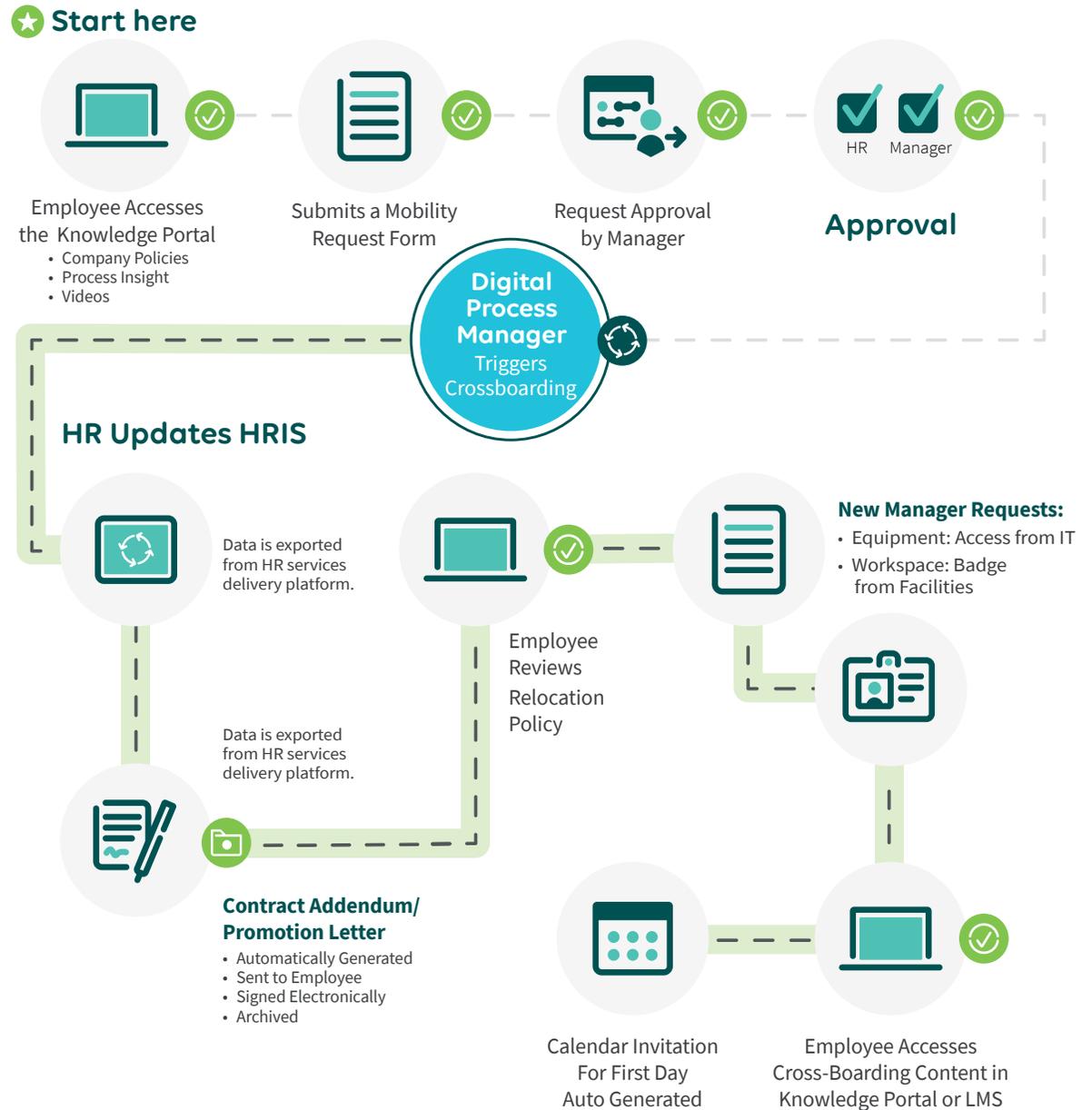
Providing employees with the opportunity to work in your different offices around the country or around the world is a way to reap the benefits of a diverse workforce. It's a win-win for both the employee and the company. But between all of the paperwork required, finding a place to live, and other moving "stuff," this process is often stressful — not to mention time-consuming. Moving people is a big investment for your organisation, so easing this stress is critical. Here's how digitising this process can do exactly that.

- An employee wishes to relocate within your organisation. They access content in a personalised knowledge portal for insights into relocation possibilities.
- After reviewing the material, they submit a mobility request form within the portal. With People Assist's employee request management capability, the request is routed to the right person or team based on a pre-configured workflow.
- When the request is approved by both HR and the employee's manager, a cross boarding process is triggered in Digital Process Manager within UKG HR Service Delivery with steps for each stakeholder.



These steps could include:

1. HR updates the HCM solution with relevant information.
2. A contract addendum and/or promotion letter is automatically: generated with the relevant data, sent to the employee, signed electronically by the employee, and then archived in the employee’s digital file in the HR service delivery solution.
3. Content in the knowledge portal, request workflows within People Assist, the employee case management solution, and retention policies for documents are localised based on new HR data. Any related permissions are updated as well.
4. The employee reviews the relocation policy in the knowledge portal.
5. The employee fills out a form in the knowledge portal to request relocation services.
6. The new people manager requests any equipment or access to systems from IT – manually, by email, or in an IT system.
7. The new people manager requests a workspace and building badge from Facilities.
8. The employee is directed to any cross-boarding content required, whether in the knowledge portal or learning solution.
9. An Outlook calendar invitation can be automatically generated for the employee’s first day in the new office.



You could also imagine other crossboarding scenarios within your own company, like if an employee is promoted to a new role where they are becoming a first-time manager. An HR service delivery solution can help ready the employee for the new role beyond the HR data transactional change by providing guided new manager training, welcomes videos and education on changes to benefits.

Each stakeholder is prompted to complete the required actions and has transparency into the process, ensuring each step is completed and compliant. With an HR service delivery solution, you can easily automate and optimise the traditionally frustrating and time-consuming internal transfer process. Employees can enjoy a smooth transition into their new role and at their new office location without having to worry about administrative procedures. Automating these repetitive steps creates the space for a more productive and agile HR team.



2 Tuition Reimbursement

Providing continuous learning opportunities for employees is a key initiative in many organisations — particularly those looking to upskill talent. The benefits include **increased innovation, performance and opportunity for upward mobility** within the company. Promoting a culture of learning also boosts your employer reputation — helping you attract and retain great employees.⁵

But managing the tuition reimbursement process manually can be disjointed and create headaches for everyone involved. Many companies handle this process manually through email. Doing it this way, HR is tasked with making sure the proper workflow is followed in the correct order, the right information and documentation is shared, and that the right stakeholders are brought in at the appropriate time.

By automating this process with an HR service delivery technology, HR is able to ensure that the correct workflows are followed, information and documentation is efficiently captured and shared, and everybody involved (including HR) is introduced only when they need to take action. Let's delve deeper into what this process can look like in your organisation when the heavy lifting is removed.



- An employee is interested in advancing their education/career and wants to see if there are any tuition or course reimbursement benefits offered by the company. The employee accesses the knowledge portal for company policies and process insight.
- The employee submits a tuition reimbursement request form which is routed directly to the manager using pre-defined workflows in case management.
- The manager approves the request, which is then routed to finance for approval and expense forecasting.
- Once the request has been approved by Finance, a tuition reimbursement process is launched in the Digital Process Manager for the employee to submit their grade, course receipt, or any other relevant documents once the course is completed.
- From there, HR can easily make changes in Payroll, with an integrated HCM solution.
- And in order to keep an up-to-date employee file, they can automatically archive the case, a signed document, or certificate of completion in the employee file management solution, Document Manager.

Managing the tuition reimbursement process in an HR service delivery solution makes sure all stakeholders involved are following the right workflow and are introduced **only when it is relevant for them** — so they can focus on other tasks. Automating this workflow also ensures compliance by capturing information and documentation at the exact stage it's needed.



3 Disciplinary Action

You work hard at creating and maintaining a positive, collaborative and safe working environment for your employees. So, when an employee needs your help with an employee relations (ER) incident, you need to be there.

An HR service delivery solution can support your employees and managers through the (hopefully) rare occasions that require disciplinary action or employee relations involvement. With a knowledge portal to provide company policies to employees and employee case management technology to make it easy for them to notify HR of incidents as soon as possible, you can stay on top of some of the more challenging parts of your work.



A disciplinary incident could be managed like this:

- An employee has witnessed a situation, or a manager needs to discuss an incident with an employee. They can access the knowledge portal to learn about the company policy, their rights, the appropriate process and how to take action.
- The employee or manager submits a case in the knowledge portal. Using pre-defined workflows in People Assist, the case is automatically routed to a special ER team to manage the incident.
- While many ER conversations will need to happen outside of technology, the ER team can keep documentation and audit trails in People Assist.
- Based on the case, HR may need to launch a process like a Performance Improvement Plan, with specific tasks for the employee and his/her manager to complete. The process can also generate documents like a written warning.
- To keep an up-to-date employee file, you have the ability to archive the case history and have any pertinent documentation sent to the employee's digital file in Document Manager. For more severe cases, HR may need to put the employee's file on legal hold, which they can do in just a few clicks in Document Manager.

Don't let an outdated, manual disciplinary action process cost you the culture you worked so hard to build and promote.

Managing this process with an HR service delivery solution ensures you're compliantly handling potentially sensitive incidents in the most efficient way. And by understanding which articles people are viewing and what requests are coming in, you can even start to spot recurring problems and try to get in front of them.

The investment in an HCM solution with integrated HR service delivery can prove to the organisation that you're serious about your culture by providing employees with policies and an easy way to contact HR with issues.



4 Offboarding Processes

Whether an employee decides to leave your organisation to pursue other opportunities, or the organisation decides to let an employee go, **it's important that HR provides an offboarding experience that's just as good as the onboarding experience.**

Employer brand and reputation is critical to attracting top talent to your organisation. When the last experience your employees have with the organisation is smooth, they're more likely to speak positively about their time with the company on employee social media platforms such as GlassDoor.

Not having an effective and consistent process to offboard employees can be a **major compliance** risk as well. It's important to have

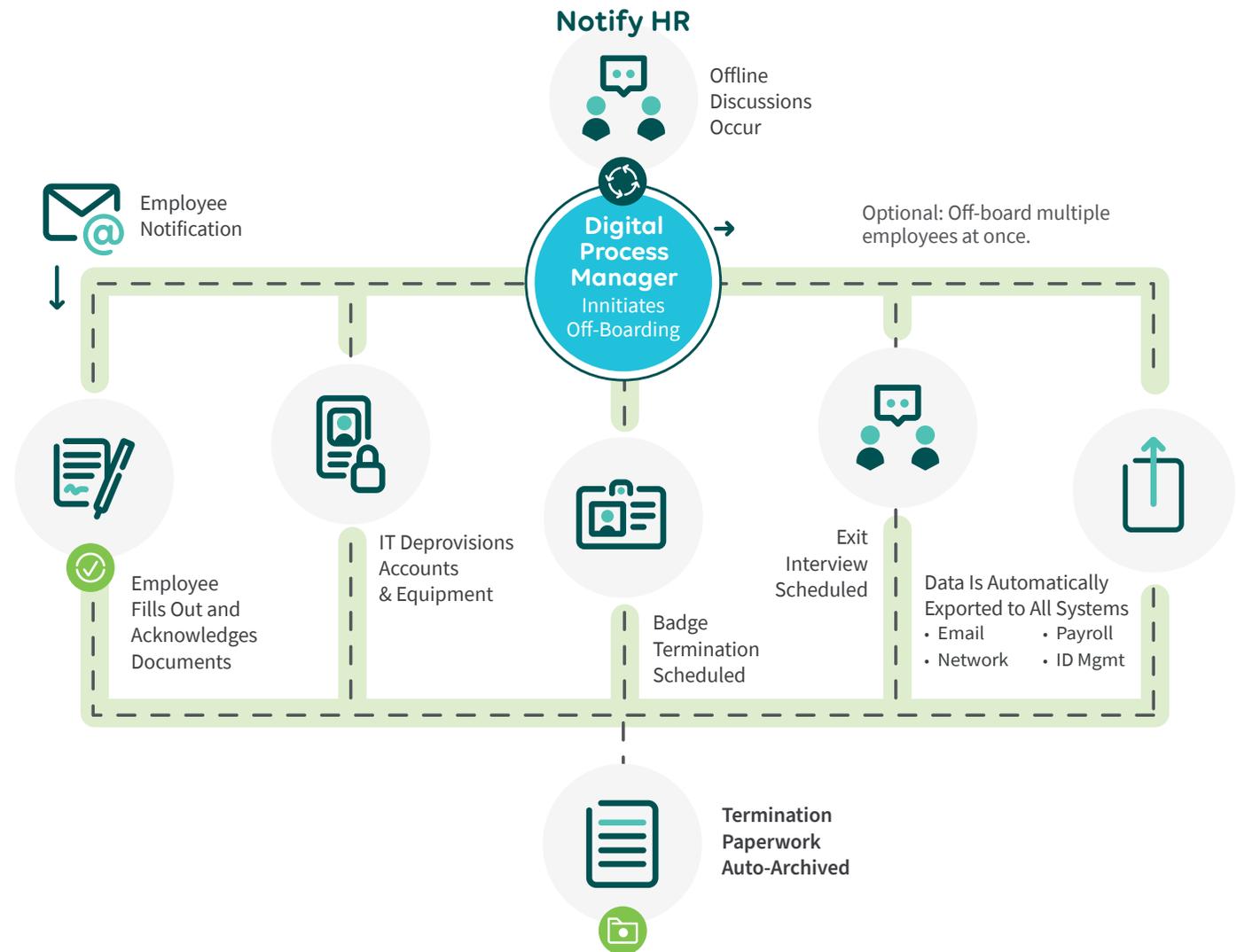
measures in place to produce and collect termination paperwork, as well as track and record the steps you've taken.

Companies typically have different steps for different offboarding scenarios. For example, they will need separation agreements for firing an employee or letting an employee go, but they won't if an employee chooses to leave. Having dedicated processes in place for all of the different offboarding scenarios will help employees easily deal with property handover, insurance and financial transitions, and any non-compete guidelines will have them singing your praises in no time.



These steps could include:

- An employee decides to leave the organisation voluntarily. After discussing face-to-face, HR is notified and initiates an offboarding process.
- The employee is notified to fill out or acknowledge any documents, e.g., COBRA coverage.
- IT deprovisions accounts and equipment.
- Facilities sets badge termination date.
- HR schedules an exit interview with the employee.
- The data from the HR service delivery solution automatically flows to other areas of the HCM solution.
- Any termination paperwork is automatically archived into the employees digital file in Document Manager.



Automating manual data entry across your various systems means that HR has more time for high touch activities, like conducting valuable exit interviews or setting up time for knowledge transfer. Having dedicated processes for offboarding has compliance benefits as well. By automating these steps and managing them in one central location, you don't have to worry that you might have forgotten certain steps like revoking the employee's access to IT accounts.

5 Mergers and Acquisitions

Merger and acquisition (M&A) is a critical strategy for many organisations, but for employees this can **one of the most uncertain times in their careers**. That's not to say that HR and leadership can't deliver a great employee experience before, during and after a merger or acquisition — and technology can help ease the way.

Leadership and HR's role in communicating with employees and reinforcing the shared vision of both organisations **can have a huge impact on employee morale, commitment to the organisation, and employee productivity**. With the help of technology, HR can provide smooth M&A-related processes for employees. Take a look at how one process may look:



With technology, HR can quickly and easily welcome new employees into the organisation and dispel any rumors or feelings of uncertainty. By streamlining these processes, HR is also able to deliver consistent messaging, maintain compliance and of course, get employees excited about joining their organisation.

These steps could include:

- Newly acquired employees receive an email inviting them into their new company's "welcome" portal. In the knowledge portal, HR can easily promote relevant acquisition policy information, welcome messages, videos, etc.
- Employees entering the organisation will likely need to complete various tasks. HR can initiate these processes with HR service delivery technology, triggering steps the employees need to take.
- The employees are notified to acknowledge policies, such as security training.
- The employees also need to sign documents, such as a Non-Disclosure Agreement, Non-Compete Agreement, and Stock Agreements.
- These documents are automatically sent to the employee's personal file in Document Manager.



6

Life Status Change

A life status change, like a marriage or the birth of child, is often the result of a special life event for an employee. But when we think about all of things that happen around such an event — like dealing with a frustrating maternity leave process, or updating your health insurance policy — it can quickly take the joy out of the special occasion.

HR service delivery technology **empowers the employee to initiate this process through self-service** and enables HR to effectively **manage the entire process in one central location**. Here's how that updated process may look:

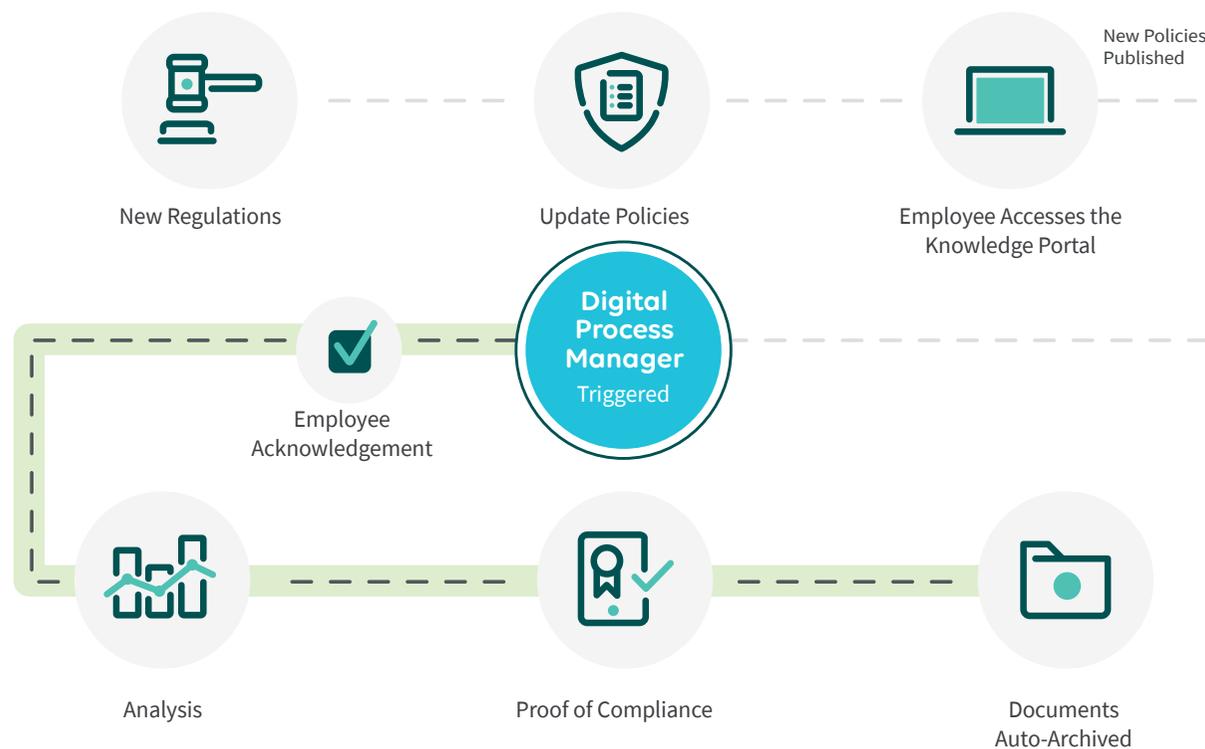
- An employee just got married and has changed her name. She needs to update her personal information, so she logs into the HCM solution to make this change.
- This triggers a process in the Digital Process Manager.
- The employee is prompted to update healthcare coverage if she desires and beneficiary changes.
- The employee is sent tasks to submit any documents, including a marriage license, driver's license, and social security information, that may have been updated with the name change.
- These documents are automatically sent to the employee's personnel file in Document Manager.
- Payroll is notified of the name change.
- IT is notified to update email address and accounts across the systems.
- HR sends a congratulations card to the employee.
- Lastly, new business cards are ordered.

Centrally managing a life status change process with HR service delivery technology eliminates unnecessary steps, wait time, and manual data entry between systems while creating a more productive and agile HR team. By using technology to automate this process, you also deliver a great experience to employees during the critical moments in their lives.



7 Security Training and Policies

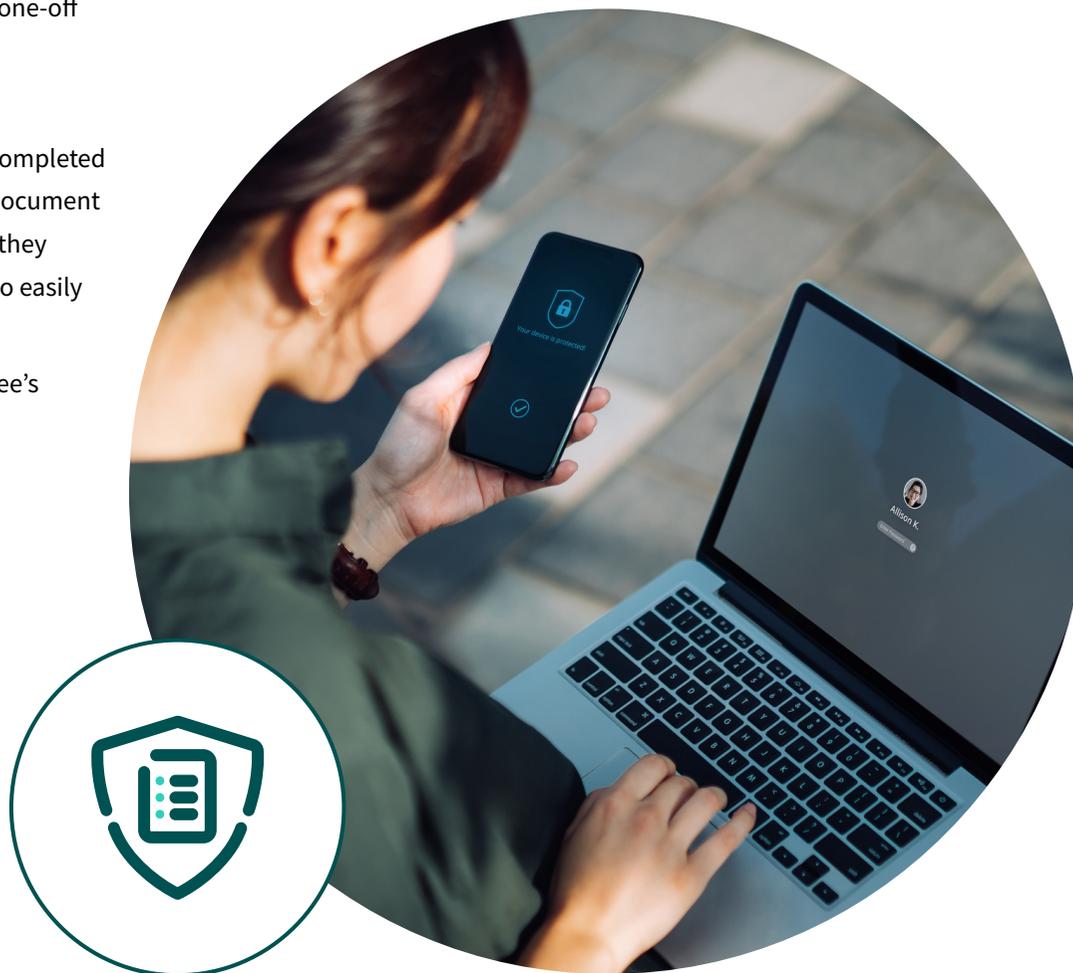
Phishing and cyber security attacks are on the rise and their ramifications can be detrimental to an organisation. In 2017, data breaches cost companies an average of **\$3.6 million globally!**⁶ With employee negligence the main cause of data breaches, it's no wonder organisations want to make their IT security policies and procedures well known throughout the company. Here's how an HR service delivery technology and a contextual knowledge portal can help:



These steps could include:

- A new regulation has passed, requiring the company to update their security policies and procedures. HR publishes these policies and procedures in the knowledge portal.
- HR generates a process in the Digital Process Manager within UKG HR Service Delivery for all employees to acknowledge the new policy. This kind of process could also be triggered as a one-off when a new employee joins the organisation.
- Employees review the policies and acknowledge them.
- Analytics give HR visibility into which employees have completed the process and which still need to. HR can generate a document which is then signed by each employee to indicate that they completed the process. These documents can be used to easily prove compliance.
- These documents are automatically sent to the employee's personnel file in employee file management.

Automating this process helps organisations prove compliance with security certifications like ISO 27001 or SOC Type II. In most organisations, HR is the one function that has contact with every department and employee in the company. So, it's no wonder why IT and security might rely on you to assist in company-wide security initiatives.



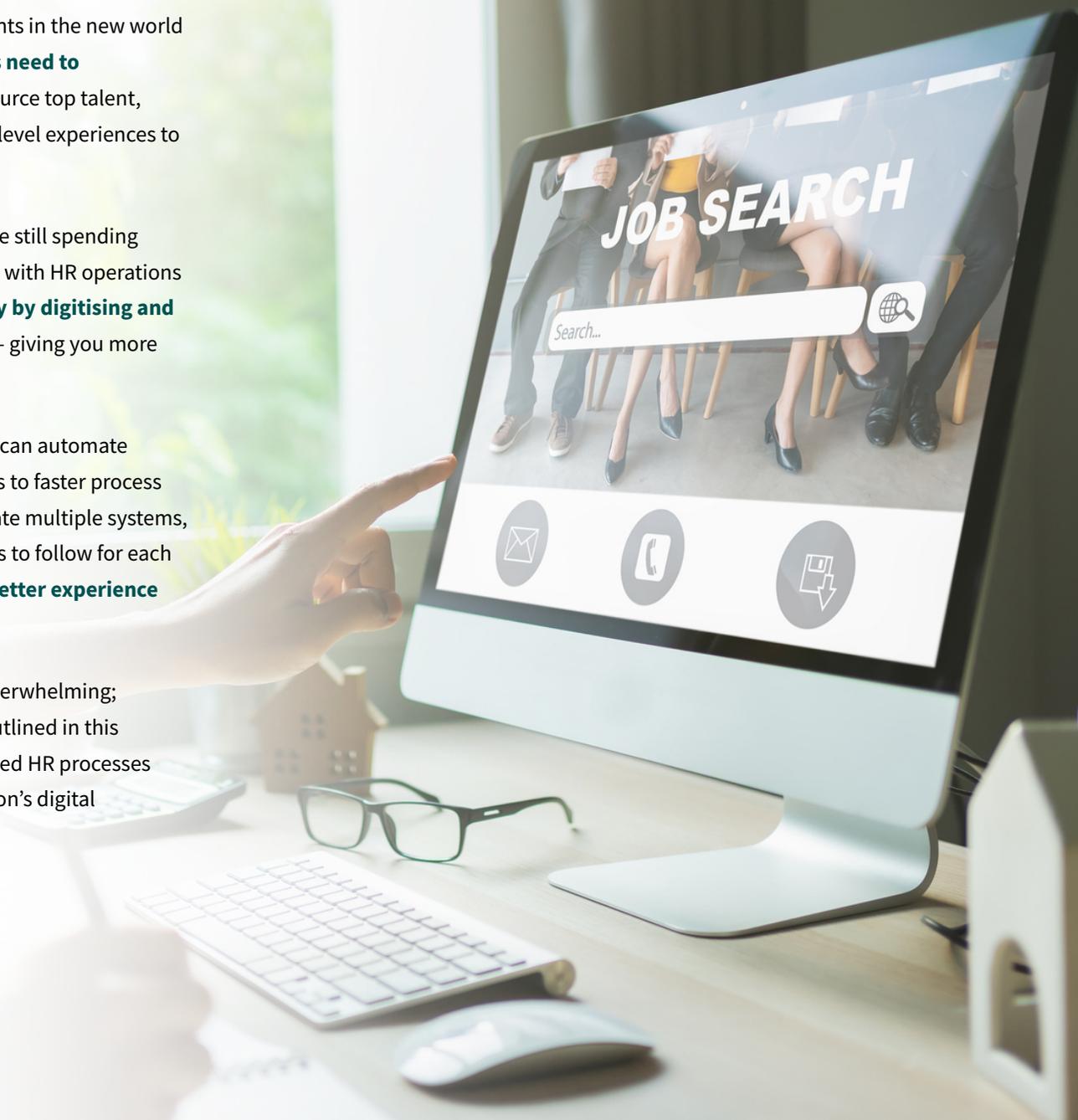
How to get started today

Difficult-to-find talent and hard-to-fill jobs are constants in the new world of work. In this new world of work,⁷ **HR professionals need to focus on strategic activities** like how to creatively source top talent, improve their employer brand and deliver consumer-level experiences to their employees.

Achieving these initiatives proves difficult when you're still spending much of your time on administrative tasks associated with HR operations and processes. HR can **drastically improve efficiency by digitising and automating manual, document-driven processes** — giving you more time to spend with your people.

An HCM solution with HR service delivery technology can automate and optimise manual HR processes. Automation leads to faster process completion times because HR no longer has to navigate multiple systems, talk to multiple stakeholders or look up which process to follow for each employee. And this faster completion time means a **better experience for employees in their moments of need**.

The opportunity for automation is prevalent, if not overwhelming; knowing where to start is key. The seven processes outlined in this whitepaper are some of the most commonly automated HR processes and serve as a great starting place for your organisation's digital transformation.



About UKG

At UKG (Ultimate Kronos Group), our purpose is people™. Built from a merger that created one of the largest cloud companies in the world, UKG believes organisations succeed when they focus on their people. As a leading global provider of HCM, payroll, HR service delivery, and workforce management solutions, UKG delivers award-winning Pro, Dimensions, and Ready solutions to help tens of thousands of organisations across geographies and in every industry drive better business outcomes, improve HR effectiveness, streamline the payroll process, and help make work a better, more connected experience for everyone. UKG has more than 13,000 employees around the globe and is known for an inclusive workplace culture. The company has earned numerous awards for culture, products, and services, including consecutive years on Fortune's *100 Best Companies to Work For* list.

To learn more, visit ukg.co.uk.

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Our purpose is people

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