



CHOOSING THE RIGHT HR SERVICE DELIVERY TECHNOLOGY FOR YOUR ORGANIZATION: A BUYER'S GUIDE

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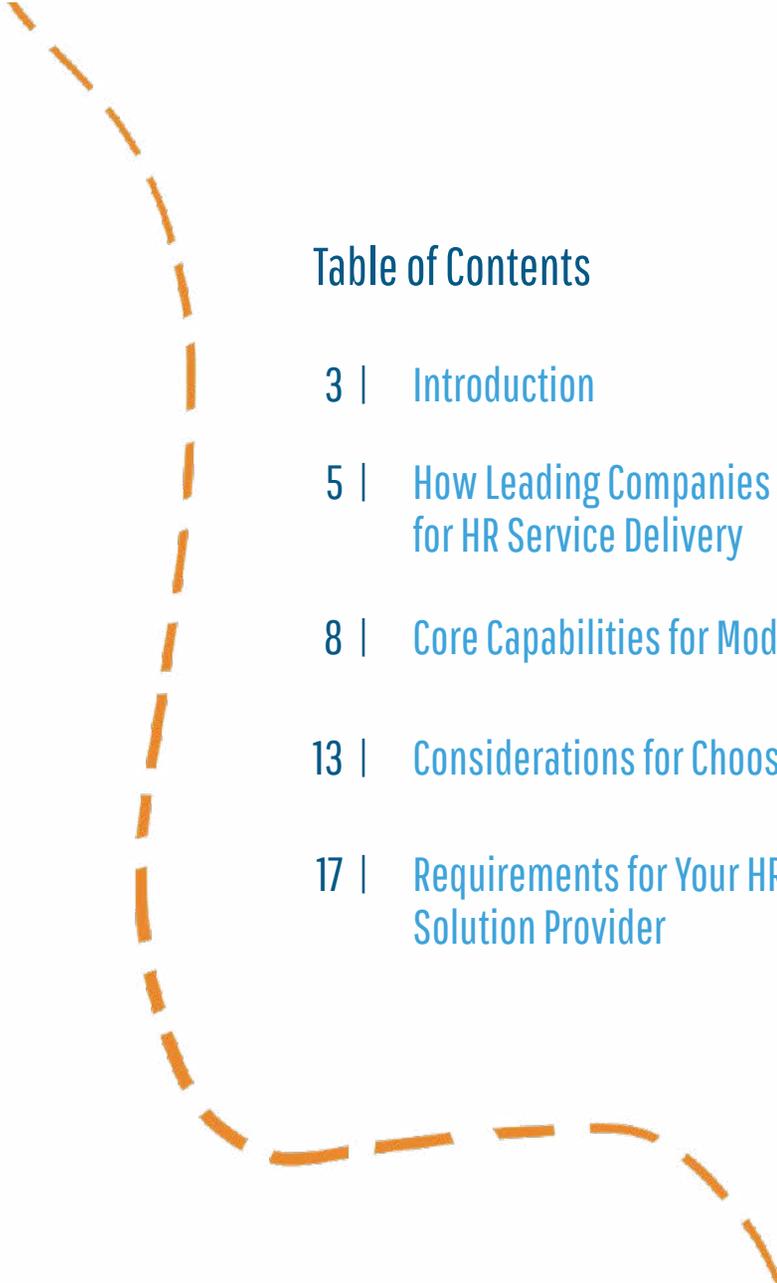


Table of Contents

- 3 | Introduction
- 5 | How Leading Companies Use Technology for HR Service Delivery
- 8 | Core Capabilities for Modern HR Service Delivery
- 13 | Considerations for Choosing the Right Technology
- 17 | Requirements for Your HR Service Delivery Solution Provider

For these reasons, an HR Service Delivery platform can be a game-changing technology for organizations. Streamlined, fast, and effective HR operations enabled by **a modern HR Service Delivery platform** can be transformative, saving your organization significant costs and elevating the employee experience. An HR Service Delivery platform not only helps you to meet employees' consumer-level expectations, it also enables your HR team to provide the best possible services to employees - creating positive interactions and fostering the employee experience.

In this guide, we'll outline everything you should look for in an HR Service Delivery platform in order to achieve a complete organizational transformation.

An HR Service Delivery Platform Enables

- ✔ Proactive compliance
- ✔ HR Shared Service Centers
- ✔ Optimized HR processes
- ✔ Consistent and personalized information for employees
- ✔ Employee file management
- ✔ Merger and acquisition management
- ✔ I-9 and Right to Work audit simplification
- ✔ GDPR compliance
- ✔ Employee engagement
- ✔ Organizational digital transformation
- ✔ Positive employee experience

Quick Tip For Your Purchasing Decision

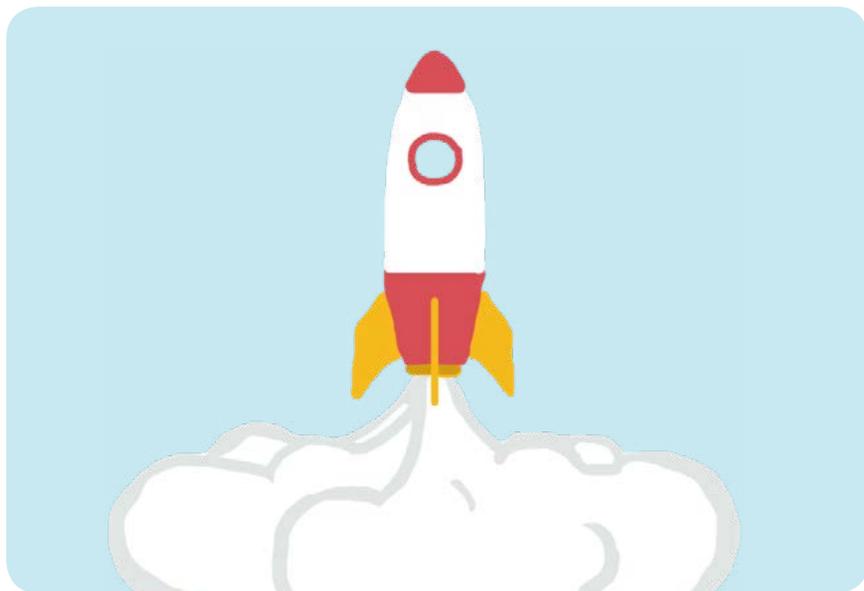
#1

Audit your processes before you implement new technology.
Improve efficiency and service quality so you can immediately see the benefits of your new technology.

How Leading Companies Use Technology for HR Service Delivery

Using Innovative Technology to Transform Your Business

At the forefront of HR technological innovation is **cloud-based HR Service Delivery software**. An HR Service Delivery platform makes it easy for HR to **help employees**, providing them with a customer service-level of care and attention. HR can offer support anytime, anywhere, quickly tackling the simplest question as well as resolving complex events, such as filing for maternity leave or an international assignment. An HR Service Delivery platform also makes it easy for HR teams to **automate** almost any manual process, with the ability to update it at any time. From efficiently **managing digital files** to **reducing compliance and security risks**, this technology effectively saves HR substantial amounts of time, allowing them to focus on strategic, value-add activities.



The Right HR Service Delivery Platform Supports Your HR Use Cases

While there are specific capabilities that an HR Service Delivery platform provides your HR teams, it is essential to identify the top processes or use cases you need to be supported by this technology. Many of these are driven by demands from other parts of the business in addition to your HR strategy. Identifying use cases will help you prioritize the capabilities you are shopping for and ensure your top goals are met as quickly as possible. Some common examples we see include:

- ▶ **HR Shared Services:** In order to support an HR Shared Service Center, HR representatives need technology that helps them resolve employee requests quickly and consistently, from anywhere.
- ▶ **Compliance:** An HR Service Delivery platform supports localized retention schedules for documents, as well as the ability to personalize a process to comply with local employment laws. Laws and regulations change all the time, so you'll want a system that's easy to update too.
- ▶ **Onboarding:** Just one example of an HR process that can be supported with this technology, automate the onboarding process by providing content in the knowledge portal for new employees, and steps for new hires, hiring managers, and HR reps that span your HR systems.

- ▶ **Mergers and Acquisitions:** In an M&A, you'll need to provide employees with a lot of information that will need to be personalized based on the different entities. An HR Service Delivery platform makes it easy to provide this content as well as request any relevant documents or acknowledgements, smoothing the transition for your new workers.
- ▶ **Remote or non-computer workers:** An HR Service Delivery platform enables HR to deliver services to all employees, even if they are not in your office or if they do not have desks or work email addresses, such as workers in a manufacturing facility or retail workers.
- ▶ **Relocation:** Similar to onboarding, there are many steps employees and HR operations professionals need to take during a relocation. These may include completing transactions in multiple systems, such as acknowledgements or viewing content, and the back-end process can be managed with an HR Service Delivery platform.



An HR Service Delivery platform is not an Enterprise Content Management or IT Service Management solution with an HR spin on it. It is a solution designed to support HR's contribution to the business without customization or ongoing coding investments required. For example, Enterprise Content Management systems typically focus on storing documents, while an HR Service Delivery platform enables **active management across the document lifecycle** - from creation, to storing, to accessing, to securely sharing, to disposition.

Similarly, IT Service Management solutions focus on repeatable tasks to resolve employee technology issues, whereas HR needs the ability to **personalize responses** based on the employee. Documenting your top use cases and requirements along with what IT resources if any are available for implementation and customization can help you understand if a generic enterprise solution can work for you or if an HR Service Delivery platform is a better investment.

Quick Tip For Your Purchasing Decision

#2

Identify top use cases.

Understanding the strategic goals and drivers will help you build the business case and align leadership.



Core Capabilities For Modern HR Service Delivery

An HR Service Delivery Platform Integrates Key Capabilities

Employees and HR professionals alike deserve the kind of consumer technology experience they receive in the rest of their lives. HR technology should be **personalized** for the employee, available **on-demand, from any device**, and **easy to use**. Employees want to get answers to their HR questions on their own and to initiate HR requests without having to know which person in HR can help. HR professionals need a way to **create and update processes**, policies, workflows and forms on their own, not to mention to **reduce time** on manual, repetitive tasks. And it should be easy to proactively manage compliance, measure performance, identify bottlenecks, and **continuously improve HR operations**.

To help your organization achieve these goals, we are providing a modern definition and list of capabilities to consider for each of the major functions provided by an integrated HR Service Delivery platform. These functions include:

- ▶ Knowledgebase
- ▶ HR Case Management
- ▶ Process Automation
- ▶ Employee File Management
- ▶ Analytics



Knowledgebase

Based on employee data defined in your HRIS, the Knowledgebase provides a **personalized experience** for your employees. When your employees need to search for information about HR policies or processes, they access the self-service Knowledgebase which displays only information specific to that employee type, location, level, etc. Acting as a central point of contact for all HR information and requests, the Knowledgebase is available **anytime from any device**, including mobile.

The knowledgebase empowers employees to find answers to HR questions on their own, allowing HR to spend their time on more complicated requests. Employee questions and requests are submitted through the portal, and integrated Employee Case Management will automatically route the request to the right person in HR to help. You can also use analytics to monitor the type and frequency of requests, and what content in the Knowledgebase is most often viewed.

Key Capabilities

- ▶ Navigate personalized content based on employee attributes
- ▶ Access the portal from any device
- ▶ Search by keyword or category
- ▶ Provide self-service capabilities for employees to learn about policies and take action when ready
- ▶ Give employees ability to initiate a request for HR service
- ▶ Give employees ability to contact HR when questions cannot be answered in the portal
- ▶ Use analytics to see which articles are viewed most frequently, the number of questions deflected by articles, and other key stats

Employee Case Management

Employee Case Management allows HR to effectively manage employee requests. Questions or requests submitted through the Knowledgebase are automatically routed to the right HR representative through pre-defined workflows that are **easy for HR teams to create and edit on their own**. In Employee Case Management, HR representatives can resolve requests (or cases) with templated responses, collaborate with HRBPs or specialists, track case history, access any relevant employee files and more. Track and report on key metrics, such as **SLA performance**, requests by category, time to resolve, and more in order to measure and continuously improve HR Service Delivery performance.



Key Capabilities

- ▶ Create workflows without needing to code
- ▶ Track changes made to requests
- ▶ Save templated responses for faster service and consistent communication
- ▶ Quickly access employee documents and files
- ▶ Collaborate, swarm, or escalate a case when necessary
- ▶ Send documents generated as part of a case to the employee file
- ▶ View individual HR representative analytics to understand performance by employee
- ▶ View analytics to easily spot trends, bottlenecks, and measure HR representative performance

Process Automation

People-based processes don't need to be manual or ad hoc. From tuition reimbursement to maternity leave, it should be easy for HR to automate processes. And in order to keep up with changes in policy or regulations, HR needs a way to create and update processes and workflows on their own - **without having to code**. Process Automation technology allows HR to create and automate back-end processes that span transactions managed in your other HR systems.

While standardizing processes globally, you will need the ability to **personalize processes** based on employee attributes in the HRIS, like employment type or location. This will help you ensure **compliance** with local regulations and provide a better experience for the employee. Any documents generated as part of a process are automatically stored in the relevant employee folders. And analytics can help measure the effectiveness of processes and identify any bottlenecks, constantly driving improvement.



Key Capabilities

- ▶ Build and automate personalized processes, such as tuition reimbursement, maternity leave, and onboarding
- ▶ Build templated forms in compliance with company policies and localized legal requirements - no coding needed
- ▶ Create, manage, and track tasks for employees, managers, HR teams, or admins
- ▶ Create and update workflows and forms without IT resources
- ▶ Initiate a process based on reports, requests, or a form completed by the employee in the Knowledgebase
- ▶ Trigger a process automatically when an event occurs in another system, such as your ATS or HRIS
- ▶ Automatically send any documents generated as part of a process to the employee file
- ▶ View analytics to see process completion rates, view bottlenecks, and continuously improve

Employee File Management

More than storage, HR documents require active file management. Centralizing digital employee files into an Employee File Management solution enables HR to **actively manage files across the document lifecycle**, providing a single, secure place where HR can quickly and easily create, store, access, share, and delete employee files from any device.

Employee File Management saves HR from managing hard copies and from searching for documents across multiple systems. When dealing with documents, **compliance** is key. It should be easy to see what documents are missing or are about to expire so HR can proactively reach out to employees and remedy the issue before an audit ever occurs. And any documents created from a process or case are automatically stored in the correct employee file.

Key Capabilities

- ▶ Centralize employee files in one place so they are easy to find, with role-based permissions to control access to files
- ▶ Generate simple or complex documents and send to employees for signature or to the employee file
- ▶ Securely share documents with a third party, such as your legal team or external auditors
- ▶ Easily search for files by document type, employee, date, and more
- ▶ Quickly see what documents are missing or about to expire, and easily request documents from employees
- ▶ Prove compliance to auditors or other third parties by quickly pulling reports to show all required documents exist
- ▶ Set retention schedules by geography to ensure documents are in compliance with legal requirements and company policy
- ▶ Place documents under legal hold with a click of a button
- ▶ Enable employees to sign documents electronically
- ▶ Send documents and allow employees to upload documents to personal electronic storage



Quick Tip For Your Purchasing Decision

#3

Include IT in the process.

IT can help you assess how new technology will fit into the overall tech strategy at your organization and will likely be a key stakeholder in the purchasing process.

Analytics

Providing comprehensive information about previous unknowns, such as how much time an employee takes to sign a contract and what types of requests are received most frequently, analytics help HR spot bottlenecks and **track performance**. This data, generated by the cases, processes, and employee files, is presented in easy-to-read dashboards and helps HR make better, more **informed decisions** and proactively deliver the best possible employee support. The ability to strategically prioritize resources and activities drives **continuous improvements** to services and **increased productivity**.

Key Capabilities

- ▶ Monitor KPIs and get insights into average response time, SLAs, request categories, and more in order to get the information you need to manage services more efficiently
- ▶ Access easily configurable dashboards to monitor processes and drill down to get a closer look at data
- ▶ Get performance insights to measure the effectiveness of your HR reps and the value of the information in your Knowledge Portal
- ▶ Identify opportunities for improvement, such as upskilling or redistributing HR representatives and streamlining processes
- ▶ View missing or expiring documents to proactively manage compliance
- ▶ View trends over time to track long-term performance and your ROI

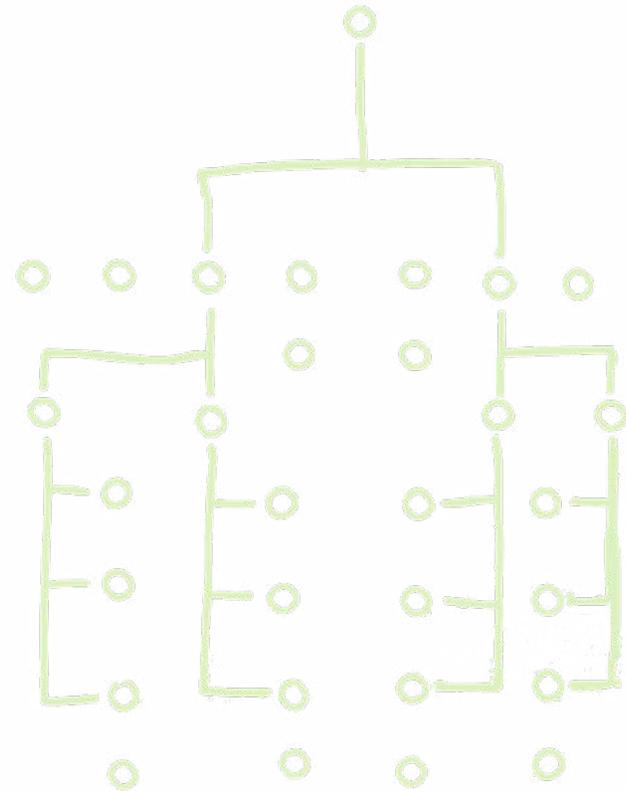


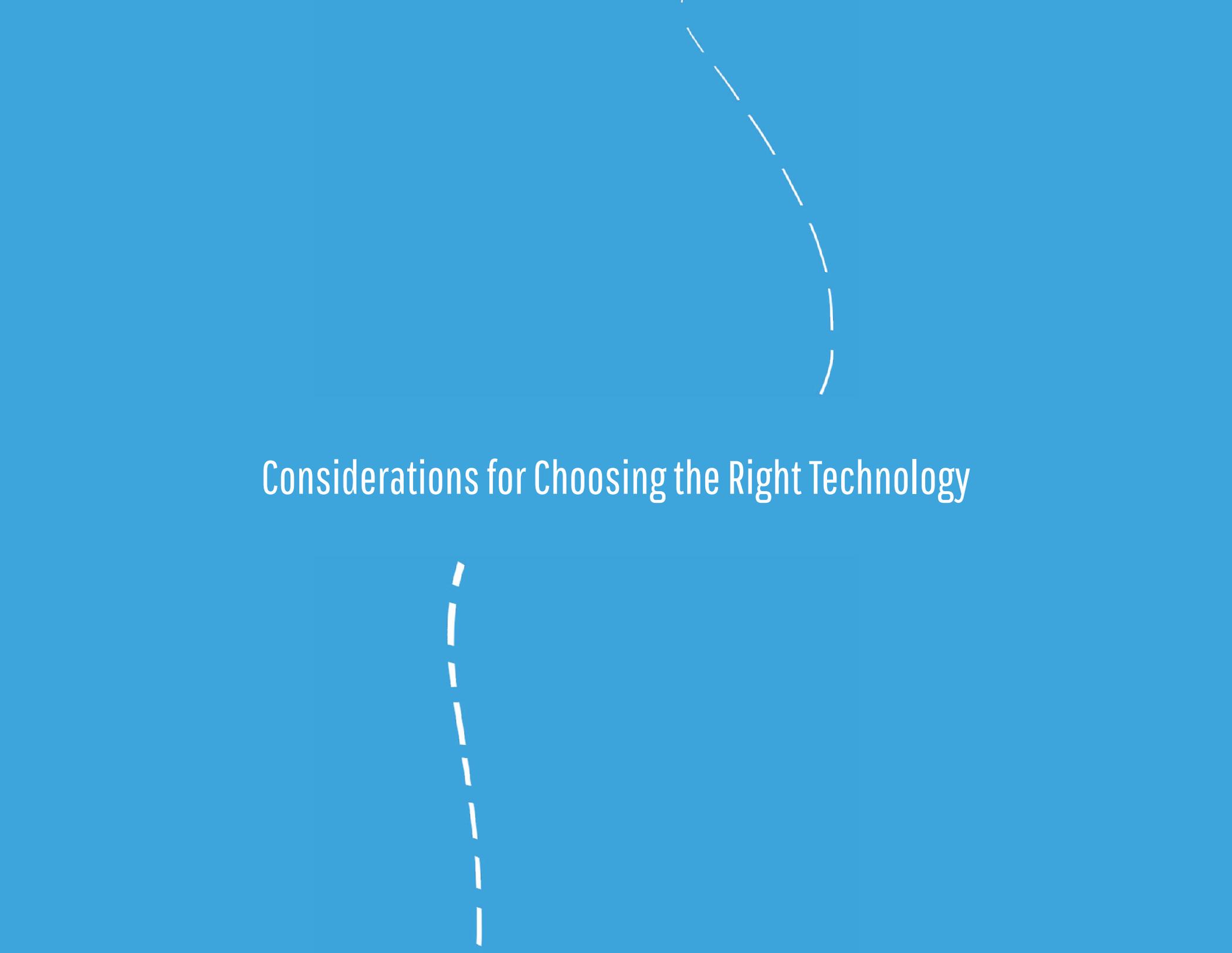
Quick Tip For Your Purchasing Decision

#4

Make a realistic plan for continuous improvement.

Setting goals and metrics helps you see where your new technology is most successful and where changes may need to be made.



The background is a solid blue color. There are two decorative white dashed lines. One is a curved line in the upper right quadrant, and the other is a curved line in the lower left quadrant.

Considerations for Choosing the Right Technology

#1 | HRIS Integration

You've likely already invested in HR technology of some kind. It's important to make sure you select technology that integrates with your existing HRIS. Your HR Service Delivery platform should integrate with your HRIS and other HR systems so that the **employee experience** is personalized based on the employee attributes **already in your HRIS**. When employee attributes change in the HRIS, such as when an employee transfers to another location for example, they should automatically update in your HR Service Delivery platform so your employees still only see information and processes relevant to them.

An HR Service Delivery platform should be able to work with multiple HRIS's. You may have multiple systems of record for different pools of employees, but you want to deliver them the **same experience**. Additionally, you may decide to switch to a different HRIS at some point. It should be easy to switch the integration so that your HR Service Delivery platform maps to the data in your new system without a disruption of service delivery to your employees.



#2 | Extensibility

In addition to integrating with your HRIS, you'll want to think about how your HR Service Delivery platform works with the rest of your HR tech ecosystem. For instance, if taking a course in the Learning Management Systems (LMS) is part of your internal transfer process or if you want documents from your Performance Management System to automatically flow into an employee file, you'll need your platform to manage the interactions with these systems. Choosing a platform that can integrate with your other systems means you can **leverage the investments you have already made** in order to get more out of them.

And with **single sign-on**, or SSO, users can traverse between systems quickly and seamlessly, without needing to sign in again every time they switch between systems. This provides a better user experience for employees and HR users - who may not always know which system to go to for what - as they move between systems to complete transactions.

#3 | Global Focus

If you have employees working in different countries around the world, your new technology should offer the ability to **provide localized support** for them. It's critical that HR offers services to employees wherever they are by providing personalized and high quality support - even if HR is located elsewhere. You'll want a solution that allows you to standardize processes and policies at a global level, while providing localized steps and information when required. It's also important to ensure that your HR team can easily manage **global compliance** by accounting for local regulations, exceptions, and document retention schedules.

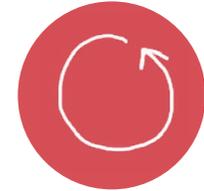
#4 | Intuitive UX

Incredible consumer technology experiences have raised employee expectations significantly. There is no longer a difference between consumer and enterprise tech — we all expect the same great experiences we have daily in our consumer lives to occur when we interact with technology at work.

HR technology should be built with end-users in mind so that new tools are **easy to learn and use**, which drives adoption. Employees should be able to go to one place to learn about HR policies and processes, and they should be able to initiate an interaction with HR from that same place. HR operations teams need to be able to access everything they need to answer employee requests in one click, from answer templates to employee files. By providing solutions designed for the different roles involved in HR processes - including HR service representatives, HR business partners, people managers and individual employees - an HR Service Delivery platform provides a **better experience and faster completion times** for both HR teams and employees who are just trying to get stuff done.

#5 | Proactive Compliance

HR professionals are responsible for myriad compliance issues. An HR Service Delivery platform helps you manage retention policies by region and document type, ensuring you are complying with local regulations. It makes it simple to see which documents are missing or about to expire, and easy to request those documents from employees - **before an audit ever occurs**. And when regulations or company policy changes, it's quick and easy to update any forms, processes, or workflows in order to comply with the changes - **no coding needed**.



#6 | HR Agility

Agile HR teams work faster, easier, and smarter. Your HR Service Delivery platform should be simple for HR to administer, without the need to code or tap IT resources. With a simple user interface, HR can make changes through mere clicks or drag and drop **without having to know code**. Because it's simple for HR teams to create workflows, processes, and forms - and to update them as needed - HR can resolve employee requests or respond to business needs fast. An agile platform will also scale to meet your needs. You may begin with a need for case management, but a flexible platform will easily extend into the processes you need to automate or provide you with deeper analytics so you can optimize your HR operations and service delivery.

HR agility means employees are supported more effectively. By providing HR representatives with a knowledge portal and saved templated responses, employees receive **consistent answers faster**. With direct access to centralized employee files, available from anywhere, HR can drastically reduce the time to resolve employee requests. And by automating processes, a significant amount of manual, repetitive work is eliminated, meaning HR can spend more time actually **interacting with employees** and providing a higher level of service.

#7 | Personalization

Your employees will have different policies and processes depending on their role, their location, their employment agreement, their job level, and so on. When an employee is looking for information regarding maternity leave, for example, they should only see content in the knowledgebase that is relevant based on their attributes. And when they are ready to go through the process of requesting maternity leave, the process will also need to be personalized for the specific employee.

Your HR Service Delivery platform will only display content relevant to the employee based on their attributes in your HRIS. This way, your employee doesn't have to search through a list of 50 articles about vacation policies to find the one related to their country - improving the **user experience** and **reducing room for error**. Any changes to the employee attributes in the HRIS will automatically update the content the user can see.

It's important to **personalize your processes** too, both for a better employee experience and for **compliance**. For example, your onboarding process will need a localized version in the US that includes a step for gathering the I-9 form. Or depending on the employment agreement type, you may have a separate process for requesting extended leave. With an HR Service Delivery platform, it's easy to personalize these processes for your employees with **data already in your HRIS**.

Not only does personalization provide a better employee experience, but it also helps ensure compliance and reduces the workload for your HR teams who are responsible for providing these personalized experiences and content for your employees.

#8 | Rapid Implementation

Major HRIS implementations can take years, but your HR Service Delivery platform shouldn't. A cloud-based deployment combined with a configuration vs. customization approach mean you should be **live within weeks**. By leveraging industry best practices, ~80% of the platform can be pre-configured before you even show up. The remaining implementation will be time spent working with you to configure the instance for your particular circumstances and requirements. And, an HR Service Delivery platform is made for HR to be able to administer and use. The implementation should not require heavy IT resources on your side.



#9 | Cloud-Based Software

As technology has moved to the cloud, organizations have realized a number of significant benefits. True multi-tenant SaaS (Software as a Service) enables solution providers to **deliver new product functionality continuously** to customers. Multi-tenant SaaS providers are much more **agile** than hosted or on-premise providers, able to respond more quickly to market demands.

A cloud-based platform means you are always using the latest and greatest version without having to deal with the hassle of maintenance fees or the time and effort needed for tech upgrades. Any upgrades will be automatically delivered to your platform monthly, so you don't have to wait 6 months for the next release in order to implement new features that were built yesterday. And since software in the cloud is available 24/7 and built to be mobile responsive, you can **access the platform anytime, anywhere, from any device**.



Requirements for Your HR Service Delivery Solution Provider

Be Global

A globally-focused provider offers a comprehensive HR Service Delivery solution that can support employees, policies, and regulations in any location where your company is active. Through experience partnering with global companies, the solutions provider brings best practices to the table and ensures the product supports localization capabilities.

A global solutions provider offers:

- The ability to support a global workforce, with employees in different countries
- Data centers that are compliant with local data privacy requirements, such as GDPR
- Expertise in global compliance requirements to reduce risk and save you time

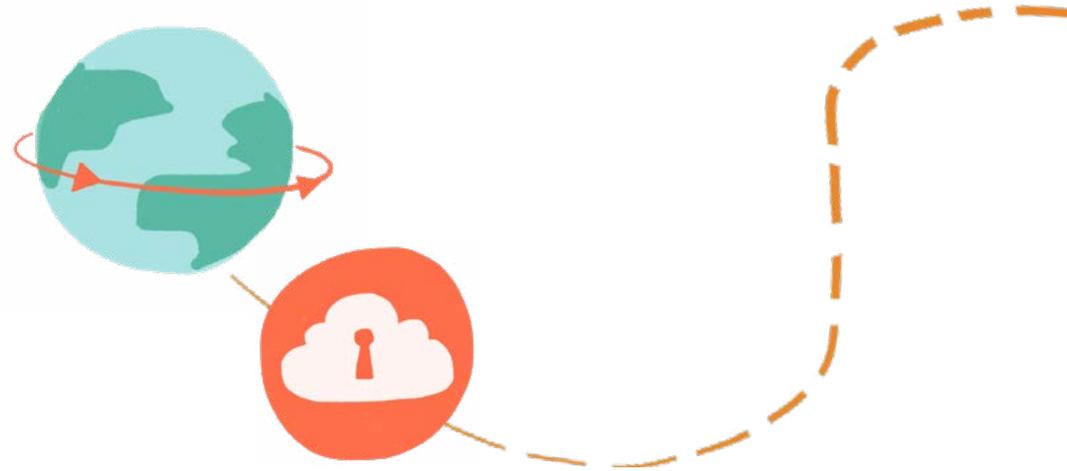


Ask A Provider: What is your experience supporting global customers?

Quick Tip For Your Purchasing Decision

#5

Foster early adopters to encourage change.
If new technology requires a shift in behavior, ambassadors for change can help relieve anxiety on the team.



Guarantee Security

Every company has security risks to mitigate, and your internal IT security team will have specific requirements for any technology vendor. Help your CISO sleep at night by partnering with a vendor who understands the responsibility of handling critical data and sets up safeguards to ensure the highest level of confidentiality.

A vendor with a comprehensive security approach will:

- Ensure secure access to data, encrypt data, and back it up
- Run audits to ensure compliance with internal security policies
- Partner with “white hat hacker” security consultants to identify and correct potential vulnerabilities



Ask A Provider: How do you keep data secure?

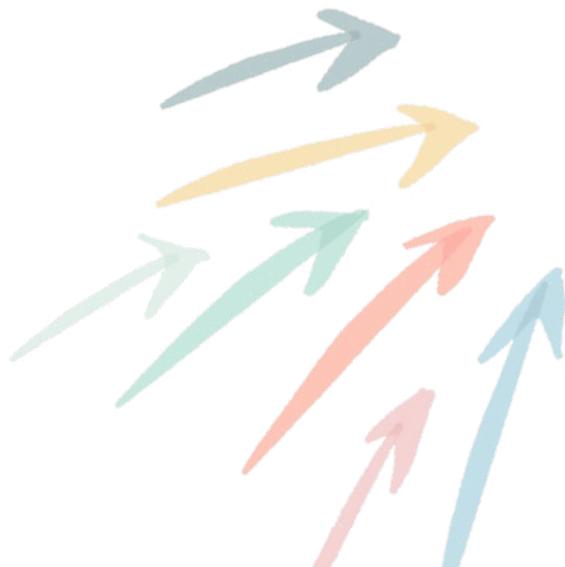
Invest in HR

There is a lot of software on the market that could be used to support HR but is not made specifically with HR in mind. Vendors not focused on HR often don't think through HR-specific requirements like compliance, personalization, and HR agility. This leads to frustration from both HR users and employees - and a bad user experience. Providers focused on HR think through the user experience for both employees and HR, as well as the specific use cases and requirements for HR Service Delivery. With an HR-focused vendor, you never have to worry about HR prioritization - 100% of R&D dollars will be spent on HR-specific needs.

HR-specific vendors are game-changing because they:

- Build software with the end user in mind, making adoption and sustained use more likely
- Provide technology that is designed for people rather than tickets or documents
- Devote all development resources to solving HR use cases

Ask a Provider: How do you support HR-specific needs, like compliance, personalization, and the ability to adapt quickly to changing regulations? What percent of your development budget is allocated to HR requirements?



Innovate

It's not enough for modern HR Service Delivery solutions to simply improve upon old tools - they must be innovative in design and functionality to keep up with a quickly evolving service delivery world. Frequent releases are key to speed, and your provider should partner with customers to identify the most impactful opportunities for innovation.

Innovative HR Service Delivery solutions should:

- Focus on agile development processes
- Research new tech trends to build software
- Meet consumer-grade user expectations in design, functionality, and access

Ask a Provider: How does innovation fit into your strategy and what are some concrete examples?

Have a Clear Implementation Plan

Transitioning to new technology can feel stressful and overwhelming. It's important to have a vendor with a proven implementation methodology. Knowing exactly what your new provider offers during implementation, as well as what you are responsible for, makes the process feel more manageable and helps you manage both expectations and resources.

Transparent and detailed implementation plans provide:

- Detailed explanations of your responsibilities and of the vendor's responsibilities
- Best practices for an implementation like yours
- Support to your team before, during, and after implementation

Ask A Provider: What does a typical implementation involve?

Invest in Your Success

Your technology provider should be more than just a vendor; you need a partner. Beyond tactical support, they provide trusted resources you can rely on. You want to feel as though they are working WITH you every step of the way and that your voice matters. This partner should be investing in your customer satisfaction, working with you to ensure your success.

When your vendor is truly a partner, they provide:

- Ongoing feedback loops so your input is incorporated into the product roadmap
- Co-innovation opportunities for you to help drive new features
- Best practices based on experience with other customers and prior implementations



Ask a Provider: What are the top 3 ways you maintain a partnership with customers?



Grow with You

Customer support is critical for your success, and it doesn't stop at traditional, reactive technical support. Your vendor should offer training sessions, live or virtual depending on your needs, as well as resources for ongoing learning. You may also consider services that help manage the change to this new way of doing things, ensuring adoption and sustained use of the software. And you may need a higher level of service, depending on your company, so you'll want to understand if there are premium service options or other services that cover areas of expertise.

Your provider should offer resources for:

- Training and enablement for your team to support adoption and sustained use
- Reactive and proactive support to ensure your success
- Premium or specialized services for more unique needs, like assisting with change or compliance



Ask a Provider: What services are provided and do you have value-add options available?

Your HR Service Delivery solution provider must:

Be Global | **Guarantee Security** | **Invest in HR**
Innovate | **Have a Clear Implementation Plan**
Invest in Your Success | **Grow with You**

PeopleDoc by Ultimate Software

PeopleDoc by Ultimate Software is committed to putting people first. The PeopleDoc HR Service Delivery platform helps HR teams upgrade the employee experience, improve HR agility, and ease compliance management. PeopleDoc global cloud solutions provide employee case management, knowledgebase, process automation, employee file management, and eVault capabilities.

Delivered 100% software as a service, PeopleDoc solutions integrate with a wide range of HR and enterprise systems and can be implemented in 8–12 weeks. PeopleDoc is part of Ultimate Software, a leading global provider of cloud-based human capital management solutions. Known for its “People First” culture, Ultimate has ranked in the top 25 on Fortune’s U.S.-based *100 Best Companies to Work For* list since 2012, and #1 on Fortune’s *Best Workplaces in Technology* list, in the “Large Companies” category, since 2016. Ultimate employs more than 5,200 professionals and serves approximately 6,100 customers worldwide.

More information about PeopleDoc by Ultimate Software can be found at www.people-doc.com.

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