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CASE MANAGEMENT: THE BACKBONE OF EXCELLENCE IN HR SERVICE DELIVERY

Introduction

As HR becomes more of a strategic business partner, the market for HR case management products is getting more attention and getting more crowded. It's a good time for HR leaders to take a step back and remember the most basic of consumer advice: **Buyer beware.**

Too many HR case management products were created with an eye on the needs of IT or customer support services and have been retrofitted, re-skinned, or repackaged to appeal to the HR buyer. A smaller number of case management solutions, meanwhile, were designed specifically with HR service delivery in mind. These have HR best practices built in.

This paper from LBi Software explains why solutions originally intended for IT or customer service fall far short of meeting HR's needs today, and how an HR-dedicated system that's combined with a knowledge base and deep analytics can empower service agents and HR to:

- Resolve employee inquiries faster
- Support strategic initiatives
- Boost employee engagement
- Burnish the employer and market brands

Why Solutions Built for IT and Customer Service Can't Meet HR's Needs

Based on research by <u>LBi Software</u>, over 80 percent of HR departments that implement an IT help desk or generic customer relationship management system convert to an HR-specific application within roughly three years. Here's the good news: Using a system built for IT or customer service is certainly better than using a spreadsheet for tracking HR cases and employee concerns. And believe it or not, the manual system is still in use by some enterprise organizations.

But if HR is going to use an automated case management product, what's so bad about a system that was originally developed to serve IT or customer relationship management? True, that's better than a manual system. But HR has needs – and opportunities – that go far beyond what an IT-based case management system can provide.

"If you want the human touch of HR services, not just the ability to track numbers, incidents, and actions, you need a case management tool intended for HR," says Richard Teed, president of LBi Software. "It needs to tie into all of your HR systems and properly address all of the employee questions that arise, not just tally them."

Even if it could draw from and connect data from all of your HR systems, it's unlikely that a product originally intended for IT or customer service could meet HR's crucial need for data safety, security, and confidentiality. This challenge should be a fundamental consideration of a case management solution that is authentically targeted to meet HR's needs.

IT help desk systems, like most customer service systems, aren't generally concerned with employee privacy and information security. They're designed to handle the management of things like technical computer issues, telephony issues, and software problems.

Research from Gartner in 2012 about HCM technology was empathic about this important point. Gartner reported that while it's tempting to assume that the functionality an HR call center needs can be met by an IT system, "privacy and security require specialized functionality."

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Using a system built for IT or customer service is certainly better than using a spreadsheet for tracking HR cases and employee concerns.

"Knowledge and policy management are vital for successful shared-service deployments [in HR call center systems]," the report said.[1]

A recent **blog post by Howard Kaplan,** LBi Software director of business development, points out that an IT-centric help desk fails to offer any of the following features that an HR-dedicated case management system should provide:

- Guaranteed compliance with HIPAA (the Health Insurance Portability and Accountability Act) and regulations for PHI (Protected Health Information), PII (Personally Identifiable Information), and Safe Harbor guidelines
- An HR-specific workflow
- User-defined case confidentiality and privacy settings
- Programming built specifically for HRIS integration and HR-centric analytics
- Confidential employee-to-HR and HR-to-HR social communication maintained outside of the organization's email system
- Comprehensive user-defined settings for service-level agreement benchmarks, to ensure adherence to HR policies
- Social media integration

- The ability to maintain cases for non-employees (e.g., contract workers, retirees, and former employees) who are not in the organization's HRIS
- Easy customization and secure distribution of team reports, with each recipient's view restricted to that person's authorized records and data
- HR-specific self-service features, such as a constantly updated FAQ and knowledge bases for HR documents and company policies[2]

"Any of these features alone should concern an HR leader who's shopping for a case management system – and some of these become even more significant when you start to consider potential legal liability," Teed says. "They're obviously also going to be huge when it comes to building employee engagement and heightening trust in the organization."

*Knowledge and policy management are **vital** for successful shared-service deployments.*

[1] Gartner Inc. Hype Cycle for Human Capital Management Software, 2012. Aug. 1, 2012.
[2] Kaplan, Howard. HR Help Desk vs. IT Help Desk. Sept. 9, 2013. http://www.lbisoftware.com/blog/hr-help-desk-vs-it-help-desk/

Resolve Employee Inquiries Faster

Delays in handling employee inquiries are often only the most obvious damage caused by a poorly engineered or jury-rigged HR case management system. The unseen consequences are increased HR costs and decreased employee engagement. Gartner has reported that HR organizations spend up to 80 percent of their time managing administrative duties and employee/manager questions and issues.[3]

A case management solution that's designed solely to serve HR speeds up case management by:

- Giving HR and its service representatives real-time access to any information relevant to a case, from anywhere in the organization's human resources management system

- Offering one source of data from an employee's entire suite of HR and service center records (heightening the odds of resolving a call with the first contact with HR; it's now assumed that at least 60 percent of inquiries into an HR help desk or service center are only to verify data)
- Ensuring that all data is current and as accurate as possible
- Getting routine cases handled at Tier 0 or Tier 1 of the four-tier system model (Tier 0: An employee accesses an online knowledge base through a self-service portal; Tier 1: An HR call center representative handles the transaction or policy question)
- Leveraging the use of an employee portal for HR self-service by the entire workforce
- Creating and continuously updating on the fly a rich and easily navigable online HR knowledge base
- Integrating with each component of an organization's HR management system, beyond HR case management

"Being able to handle cases as efficiently as possible is the most obvious reward of a truly HR-centric case management system," Teed says. "But it's not as easy as it may seem because all of the moving parts, all of the different systems that HR touches, and all of the people-related concerns that HR deals with that, frankly, aren't in the wheelhouse of an IT or customer-service help system."

FOUR-TIER HR CASE MANAGEMENT MODEL

TIER 3
Resolution requires third-party intervention (e.g., contacting a benefit provider for answers)

TIER 2
Issue requires the attention of an HR expert

TIER 1
Issue is resolved by a call center representative, either by phone, email, or online

TIER 0
Employee resolves the issue through the HR portal, self-service, or HR knowledge base

[3] HR Management. A Multi-tier Approach to Delivering HR Services. 2009.

Helping HR Be a Strategic Player

"HR needs to get over its inferiority complex, stop apologizing, and seize the opportunity" to be a strategic business partner, says Dave Forman, chief learning office of the Human Capital Institute.[4]

HR is, in fact, becoming a business partner to management and lines of business. HCI reports that HR leaders who successfully build those strategic partnerships:

- Understand their organization's business
- Leverage talent
- Become a consultant and implement change

An HR-dedicated case management system provides unique features that can support HR in gaining those skills and becoming a strategic business partner.

"With the right analytics and reports, HR can proactively point to where the organization may want to change policies or improve documentation that employees are getting," Teed says. "This is far richer information than just tracking calls and transactions, like an IT-centric system is designed to do. For example, you may see a need to change health providers because more questions and problems are surfacing with one provider or one specific plan than with others."

On the other hand, as Gartner's 2012 research pointed out, a poorly run shared-services center can derail the whole HR function.

"Building a stable foundation for improved HR administration can significantly cut HR costs, and will lead to better employee service," Gartner reported. "The effective deployment of these tools will help reduce HR administrative costs. Successful shared-services projects often lead to cost reductions of 30 percent."[5]

"*Stop apologizing, and seize the opportunity*" to be a strategic business partner.

[4] Forman, Dave. The Decade of HR. The Human Capital Institute. 2013.
[5] Gartner.

The analytics and reports in a fully featured HR case management solution, meanwhile, touch every corner of an organization and can shed light on business and talent issues as far ranging as employee-manager relationships, performance development, and attitudes toward benefits and programs.

"The case management help desk gives HR an entire set of tools and resources to help it better serve lines of business and executive leadership," Teed says. Some of those tools and resources include:

- Accurate and meaningful feedback on company policies
- Studied proposals for implementing change at any level of the organization and in any area touched by the HR management system
- A wealth of accessible data and analytics available in real time
- Insight into employee attitudes and opinions without the time or expense needed to conduct formal surveys
- The freedom for HR experts to focus on employee cases that are more complex or farther-reaching than routine employee questions, and that correlate with strategic initiatives and the organization's broader business needs

"What an HR case management system will tell you is more than just how many complaints came from one department versus another," says Howard Kaplan, LBi Software director of business development. "Those are really symptoms of a greater issue at play. An IT system will simply report incidents, not how those incidents are affecting employee productivity and satisfaction."

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Boost Employee Engagement

Everything discussed so far in this paper – from resolving cases faster and easier, to playing a more strategic role in the organization – makes a strong case for how an HR-centric case management system can also help create and heighten employee engagement.

For example, a case management system designed to serve HR keeps a record, instantly available, of every employee transaction. With just a couple of clicks, an HR team member has access to the entire history of a case. The employee doesn't need to restart the process if he or she needs to follow up on a case.

"That's obviously more efficient for HR," Teed says, "and it's also an effective tool for heightening employee engagement. It shows employees that the company cares enough to handle their concerns quickly and knowledgeably – it brings consumer-like service to the world of HR."
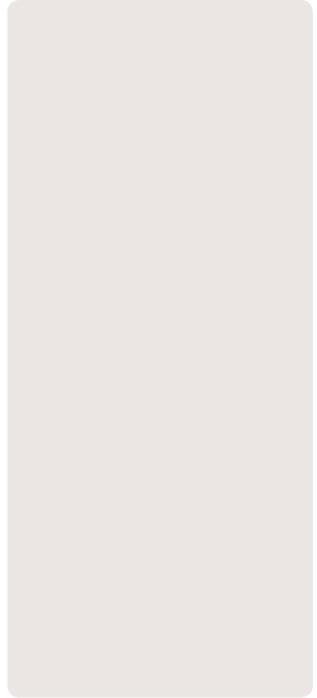
With just a couple of clicks, an HR team member has access to the entire history of a case.
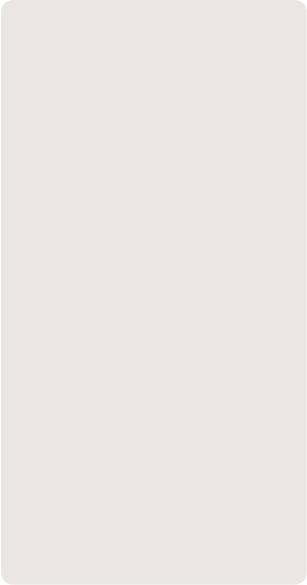
Research by Gallup and others has shown that engaged employees feel their companies value their time, give them the tools and resources they need not only to do their jobs well but also to manage their time more efficiently, and share information readily and openly.

An employee portal and employee self-service are other features of an HR case management system that boost employee engagement. They're especially effective when they're supported by an HR knowledge base. Again, it's a matter of HR enabling employees with the same kind of self-service, resources-rich experience they are becoming accustomed to as online consumers.

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For an HR help desk, that means empowering employees to find answers to as many questions as possible online, on their own time, and without needing to talk with or wait for a response from an HR representative. LBi HR HelpDesk, for example, has a technologically sophisticated employee portal that's also very user-friendly. In addition to being able to access a knowledge base of questions that are commonly asked in the system, employees can:

- View histories of their own cases
- Create new cases online from the employee portal
- Create new cases by emailing the case management system

"The bottom line," Teed says, "is that giving employees direct access to their own information as well as the resources in a company-wide knowledge base increases employee satisfaction through a faster, easier way to resolve issues."
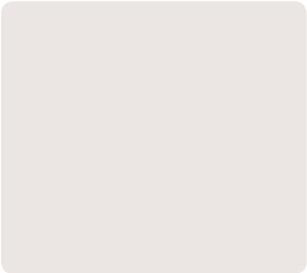
Burnish Your Employer and Market Brands

The days are gone when a company could control its brand either as an employer or a market solution. Gone also are the days when nearly everything a potential candidate or buyer knew about a company came directly from its public affairs office, from stories the company urged its employees and existing clients to disseminate, or from articles that appeared in the business media.

That was before the days of the Internet and social media, before we had the myriad channels through which an organization's image could be trumpeted – or soiled.

"Brand ambassadors, or employee evangelists, are becoming an increasingly common way for brands to leverage their biggest asset – their workforce, of course – to reach new markets, generate buzz, and put a real face on the company," journalist Eric Markowitz wrote in *Inc. Magazine*. "They can be tweeters, bloggers, Facebookers – or they could just be the people you send to corporate events."[6]

In a nutshell, today more than ever, your employees are your organization's greatest brand ambassadors – for better or worse.

The most significant reason an HR-centric help desk can improve the message employees send out about their employers is because of the employee engagement that the case management system fosters. Highly engaged employees will actively promote their employers in all kinds of ways – in conversations with friends and family, on social media, or through job referrals.

*Today more than ever, **your employees are your organization's greatest brand ambassadors** – for better or worse.*

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[6] Markowitz, Eric. How to Find the Right Employees to Be Your Brand Ambassadors. April 27, 2011.
http://www.inc.com/guides/201104/how-to-identify-your-companys-brand-ambassadors.html

"A great HR case management solution tells the employee, 'When I call HR, I'm not a number, I'm a person,'" Kaplan says. "That employee says, 'HR and the company understand my time's important, too.' They also have a sense that the company has put money behind the phrase, 'people are our most valuable asset.' Positive engagement with HR simply builds the employer brand."

Another advantage of a few HR case management systems, including LBi HR HelpDesk, is their ability to gauge employee attitudes about the company by monitoring public information that's posted on social media sites. With only a click or two of the mouse, HR leaders can easily and quickly monitor what any employee is saying about the company on Facebook, LinkedIn, Twitter, and other social forums.

An **executive brief from LBi Software** released earlier this year explains the benefits to HR from gaining insight into publicly available social media posts by employees.[7] One advantage that can heighten employee engagement – and help promote the employer and market brands – is that by being aware of social media posts, HR can support the company to act on issues and concerns that may not be getting open discussion within the company.

"Again, this can translate into greater employee engagement, without the feeling that Big Brother is looking over your shoulder," Teed says.

Another advantage of being able to monitor what employees say on social media about the company is that HR can use the information to recognize and reward positive comments. That's a novel and potentially powerful use of the feature, offered by HR thought leader **Robin Schooling** during a recent **webinar hosted by LBi Software.**

"As Robin said, you can use this feature to acknowledge employees who are positive about the company or who promote their colleagues, and you can reward that voluntary effort and create awareness of positive things at the company," Teed says. "This is a great way to use this feature in a very positive way, which really can be very powerful."

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[7] LBi Software. Monitoring Employee Posts on Social Media: Supporting HR as a Proactive Business Partner. http://www.lbisoftware.com/sm-eb-landing.html?s=lb

Conclusion

HR is increasingly being expected to act as a strategic business partner. To seize that challenge and take advantage of the opportunities it offers, HR leaders would benefit from a comprehensive HR service delivery system.

HR case management solutions are the backbone of HR service excellence — but only if they're designed and developed specifically for HR's needs and demands. Case management solutions originally intended for IT or customer service will fail to meet HR's specialized needs. An HR-centric system that includes a continuously updated knowledge base, deep analytics, and employee self-service through an employee portal can empower service agents and HR to:

- Resolve employee inquiries faster
- Support strategic initiatives
- Boost employee engagement
- Burnish the employer and market brands

A case management system that's built from the inside out and the ground up to serve HR will have the features — and deliver the benefits — that HR needs to support the company's strategic goals and be a business partner to lines of business.
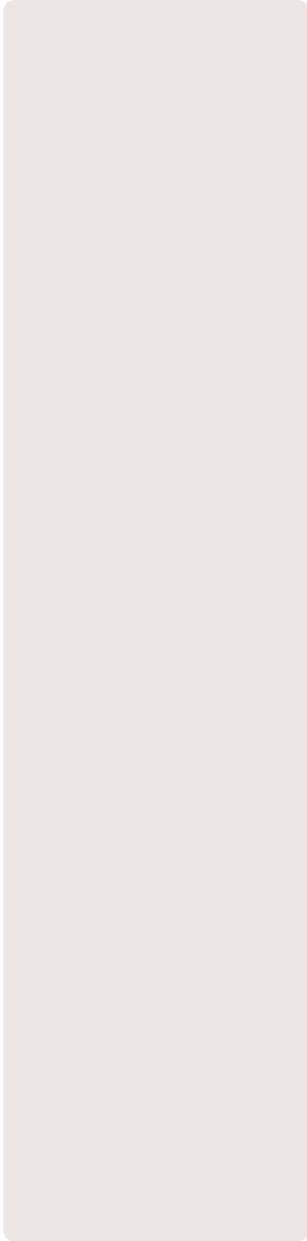
About LBi Software

LBi Software provides precisely engineered, customer-focused human resources technology solutions developed from more than 30 years of experience in HR technology and HR processes. Our flagship solution, LBi HR HelpDesk, is an innovative case manager and call-tracking workflow solution that creates a rich and powerful knowledge base on the fly. Our organic belief in – and solid reputation for applying – a true client-vendor partnership on every project ensures a highly configurable solution designed to put the power in the hands of the employee. In addition, every LBi project is supported by our rich experience and expertise in Mobile Development, Business Intelligence, Data Warehousing, and Reporting and Analytics.

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