Where the Rubber Meets the Road:

APPLYING HR TECHNOLOGY TO SOLVE REAL-WORLD PROBLEMS

Observations, Trends, and Advice From HR's Thought Leaders

LBi *Software*

What's Inside

Changing the Game for HR: Learn for Sure What You May Only Assume You Know

> "It ain't what you don't know that gets you into trouble. It's what you know for sure that just ain't so." – Mark Twain

Twain could just have easily been speaking about HR leaders today – referring to what they think they "know for sure" about what their employees believe, perceive, and feel about any of the myriad issues they face every day.

Maybe it's a concern about their benefits, or that a salary increase was delayed. Maybe they feel that a performance review was mishandled. They perceive a lack of consistency in the way a time-off policy is applied from one region to another, or their view of a sales manager is far different from the 360 reviews that manager has received.

Tools and technology are available to help HR overcome the critical mistake of assuming too much. Which means these solutions can support HR to meet the challenge of applying data to shed more light on ways their organizations can improve performance, explain why individuals or business units are missing their goals, and identify employee concerns before problems can escalate.

LBi Software is driven to provide precisely engineered, customer-focused technology solutions developed from more than 30 years of experience in HR technology and processes. Our flagship solution, LBi HR HelpDesk, is an innovative HR case management and call-tracking workflow solution that creates a rich and powerful knowledge base on the fly. That's one example of helping HR meet today's challenges.

LBi is passionate about helping HR see the challenges ahead and providing insight into how to handle them. Inside, you'll find contributions about other challenges and solutions from:

- **Bret Starr,** The Starr Conspiracy
- **Robin Schooling,** HRSchoolhouse.com
- **Steve Boese,** HR Technology Conference & Expo
- **Lisa Rosendahl,** WomenofHR.com
- **Matthew Stollak,** True Faith HR
- **Ron Thomas,** Human Capital Institute
- **Richard Teed,** LBi Software

Enjoy these perceptions and suggestions.

We hope you'll find truth here, and some great ideas to help HR more effectively play a greater strategic role in your company.

Workforce Transparency: Critical to Successfully Refocusing the Employee Experience

By Bret Starr

Here's the situation: A national enterprise organization has recently had a C-level reorganization and launched a new product line, and a regional manager is trying to deal with the impact on his team. He knows he'll need to move people around. But he's having a tough time identifying the right people – the ones who best fit with the new strategy. To complicate matters further, he doesn't know what other regional managers are doing with their teams.

We all know every business decision creates a domino effect. We know business suffers without having accurate insight into the possible effects of our decisions. What we don't fully appreciate is the damage that can be done when we don't have visibility into how those decisions are directly affecting the workforce. Leaders beg for transparency. But too often, information is still held by someone pulling the strings and holding much-needed information veiled behind a curtain.

Trends in workforce management and data are reflecting a new reality. They're built on the awareness that what powers our organizations isn't only resources or "human capital." It's people.

About Bret Starr

Bret is founder, president, and partner of **The Starr Conspiracy**, a strategic marketing and advertising agency devoted exclusively to enterprise software and services companies. He is among the foremost experts in enterprise solutions marketing, having consulted with hundreds of companies on business, product, and marketing strategy, as well as on message, brand, and promotion. Bret is a recipient of the *Fort Worth Business Press* "40 Under 40" award and has been recognized as one of the Top 100 Most Influential People in Human Capital Management by *HR Examiner.*

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HR organizations are taking the old transactional and demographic data (like employee ID numbers and cost centers) and enhancing it with social media information and other insight into the changing attitudes, behaviors, and beliefs of employees. The result: more-complete employee profiles. At the same time, we're going through an incredibly productive period of disruptive innovation, with technology advancing at accelerated rates. It's switching gears from basic automation to reinvention.

Best practices are also changing. They, too, are reflecting a more inclusive relationship with employees when it comes to everything from goal setting to determining the overall employee experience.

Understanding all of that, it should be no surprise that everyone in the organization is going to have lots of questions. They want to know what the big (and small) decisions are. They want to know how the falling dominoes will change the way they work, the way they manage their lives.

An organization's ability to answer questions with a high degree of transparency and accuracy will change how we think about our companies – not just how our company acts as an employer, but how it is perceived as a brand. Technology that's creating complete employee profiles will change how we treat the workforce. But only if that kind of information is shared. A fully featured automated HR case management system can help give an enterprise organization that kind of insight.

When companies focus more on authentic and meaningful people data –and when they see the whole picture of who an employee is – they start to make decisions that are more focused on the employee. They create an employee experience that is less about having pool tables in the break room, and is more about fostering environments in which employees can do their best work, leaders clearly articulate the future, and everyone goes back to being a person first.

As we go through this period of disruptive innovation, the companies that work hard to over-communicate to their employees (and who are open to change) will out-perform those that try to force change on employees using top-down, command-and-control tactics. A regional manager won't have to guess how a new product line will affect his team. He'll already know who will take the initiative and make it a success.

Gilding the Lily ... or Fully Applying HR Technology?

By Robin Schooling, SPHR

"Our mission statement says we're all about collaboration and communication," Bob, the company's general manager, said at the weekly staff meeting. "Employees tell us they want to share ideas and learn from each other, but they say no one listens to them. We have an 'open-door policy.' What else can we do?"

"I went to an HR conference and heard about gamification," replied Sally, the company's HR director. "I learned about nifty tools and tech products that could make this work for us. We'll get instant feedback and have a way for people to share information. We'll have buttons and badges and leaderboards. This could be super-cool! I've got money in my budget. **This** will surely let our employees know we want to hear from them!"

And off went Sally, intoxicated by the magical HR elixir, to purchase a shiny new product that was ultimately launched with much fanfare at meetings with hot brewed coffee and doughnuts with sprinkles.

"I don't get it," Bob said six months later. "I thought the launch of Gamify1000 was supposed to get people motivated, engaged, and to work as a community. But no one is talking to each other or sharing any ideas. I thought this would finally get Operations talking with Sales. That's what you told me, Sally."

"I think it's the badges," Sally replied. "We need to add more badges. Let me purchase the Gamify1000 upgrade."

About Robin Schooling

Robin is VPHR with a Louisiana-based organization, and has over 20 years of HR management experience in a vast array of industries, including manufacturing, healthcare, and banking. She's an active HR blogger at **HRSchoolhouse.com**, and is a contributor to the blogs **WomenofHR** and **SHRM's We Know Next**. She's a raving fan of the New Orleans Saints, has three precocious doggies, and once won a local "HR Professional of the Year" award.

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Sadly, Sally and her crew did not understand the full application of social technology. Although they purchased a great solution, they were woefully unprepared for its planning and execution.

During the launch and attempted adoption of Gamify1000, a few things were overlooked:

- A strong top-down hierarchy within their command-and-control environment meant that **collaboration** and **communication** were nothing more than buzzwords cobbled by the local PR hack.

- In an organization where fear was the prevalent emotion, even the leaders were hesitant to raise concerns; collaboration only occurred when the five shipping coordinators huddled around the coffee pot each morning. The launch of the program was akin to Don Quixote's journey.

- They implemented a fancy tool with no attempt to link usage or objectives to goals or defined outcomes and deliverables (beyond "this will be cool and everyone else is doing it"); no one understood its purpose.

- Company leaders failed to realize that to truly use the power of game design, they needed to offer challenges, show progress, provide some sort of reward or recognition, and encourage social networking and social experiences.

- The company failed to take advantage of other technology at their disposal, such as an automated HR case management system, to help them gain current insight into employee concerns and problems.

In the end, the living, breathing, **tangible** culture of the organization doomed this attempt from the start. Gilding a lily with a badge didn't change this fact: Underneath the shiny badge, it was still just a flower that would eventually fade.

Do You Really Know Your People? (Hint: Probably Not)

By Steve Boese

Human resources is, in the end, about people – understanding where, how, and with whom they will work best, their individual skills and interests, and finally, hopefully their dreams. By dreams, I don't mean "Gee I'd like to be lying on the beach in the Bahamas right now instead of putting together the quarterly results package." What I mean are their ideas of what a perfect job role would look like, what they would get to learn, and what makes them the happiest and most fulfilled.

Recently, I worked in an organization that (shock!) suddenly began having trouble with voluntary turnover in some particularly important locations and job categories. Specifically, an alarming number of our best salespeople in regions we had targeted for double-digit revenue growth were resigning. In a couple of instances, almost the entire sales team of a regional office walked out the door on the same day.

And in classic and typical reactive mode, we as an HR team did what we knew we should do to try to get some answers. We looked at statistics such as tenure and quota achievement to see if the people resigning were truly "regrettable" turnover (most of them were). We did exit interviews with some of them (didn't learn much from that, really). Finally, we scoured LinkedIn to try to determine whether there was a pattern or any consistency to where these folks were going. As in the exit interviews, we were unable to get much from that data, either, save for the fact that, at least in this industry, salespeople didn't jump right on LinkedIn to update their profiles when they changed jobs.

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About Steve Boese

Steve has over 20 years of experience in the design and implementation of complex HR technology for global enterprise clients. He is a co-chair of *Human Resource Executive* magazine's HR Technology Conference, a technology editor for LRP Publications, a leading HR blogger at **HR Technology**, and host of the "HR Happy Hour" radio program and podcast.

In the end, we made some fairly generic recommendations to senior management for how to try to stem the tide of turnover among key salespeople: bump up travel reimbursements, allow more flexible and results-only kinds of schedules, and simplify the commission schemes so salespeople would have a better handle on when and how much they'd actually get paid each quarter.

But these were all, as I said, generic approaches to what was here, and is in every organization, a unique and specific problem. We could have made these recommendations after taking five minutes to "study" the problem. The fact was, we had no system, no process, and no visible way to really know what our salespeople wanted before they started leaving the company. So it was almost futile to try to deduce why they left after the fact.

We should have had more employee profile data that was rich and useful, a method for them to indicate their own personal career goals and plans in a way that could have informed an overall workforce plan, and, finally, we should have had a more open and transparent mechanism to listen to these employees all along the way. We shouldn't have been surprised that people were unhappy. We shouldn't have been surprised when they quit. We didn't even dig into our automated HR case management solution to look at trends of employee concerns toward compensation, benefits, performance reviews, or other issues that may relate to sales in any business unit.

If we don't know our employees – if we don't understand the essential characteristics about them, about that combination of what they are good at, what they are excited about, and, frankly, whether they are happy (I admit that's kind of hard to know, but it's impossible to know if we never ask) – we won't truly know why they leave, or why they may be struggling before they leave.

Women in the Workplace: HR Still Lacks Insight

By Lisa Rosendahl

Henry was the manager of a 50-person maintenance shop who I knew in a previous time in my life. A new planner position was announced that would offer a promotion opportunity to maintenance employees. Two of Henry's employees, John and Marie, were recommended for a final interview. John was selected. When the human resources specialist had asked Henry about Marie's experience for the job, Henry responded, "She's good. But John supports a family. And where is Marie going to go, anyway, if we don't promote her?"

The nod of agreement that Henry got from the human resource specialist was wrong in so many ways. All else aside, it reflected a glaring lack of awareness of the power of women in the workplace.

This human resource professional is, unfortunately, not alone.

In the **2011 SHRM Workplace Forecast**, only 16 percent of human resource professionals who were surveyed identified the increased participation of women in the labor force as having a major strategic impact, and 20 percent noted no impact at all.

Competition for key talent is increasing, and succession planning in many organizations is not keeping pace with the needs of the organization. Women comprise approximately 47 percent of the workforce. It's a mistake to think they're a captive audience, that their employment with any particular organization is a "given," and that they will stay long term.

About Lisa Rosendahl

Lisa has over 18 years of experience in human resources. She has provided leadership and expertise to full-cycle strategic HR operations in public and private manufacturing organizations, and now in federal healthcare. Lisa authors a personal blog at **LisaRosendahl.com** where she writes about leadership and is a co-founder and the editor of **WomenofHR.**

***Forbes* reports** that the number of women-owned businesses has increased 54 percent in the past 15 years. During the 2008 recession, more men than women lost jobs, largely because women have more knowledge-based positions and have adapted themselves (with a higher percentage obtaining degrees) to make the most of new industries.

Some organizations are listening to the diverse needs of their employees and responding in ways that include increasing the use of non-cash awards, such as time off, time flexibility, learning opportunities, and increasing the use of collaborative technologies that allow employees to work from anywhere. Automated HR case management systems can, meanwhile, give HR insight into workplace concerns that might be gender-related.

There are steps in the right direction that benefit all employees, of course. But for women, it's more than that. It's a matter of trust. With the best of misguided intentions, women find themselves drawing the short straw. Talented women are increasingly vital to the success of organizations, and human resource professionals failing to recognize this will find themselves with gaping holes in their succession planning efforts.

And that is the least of their worries.

Human resource professionals who aren't willing to see, think, and feel differently about what they do every day based on current developments and trends are not forward-thinking. They are not supporting the business. This is bad news for women, men, and the entire workplace.

Social Media and the Employee Value Proposition

By Matthew Stollak, Ph.D., SPHR

Imagine this scene (it's not hard to do): Michelle Lee is the senior human resource director for TPS, a large global transportation company, who'd recently returned from a weekend company retreat. During the retreat, informal conversation revealed that although many employees liked being at the firm, they also had no compelling reason to want to continue working there.

About Matthew Stollak

Matt Stollak is an associate professor at St. Norbert College and advisor to the St. Norbert College SHRM student chapter. He can be found on Twitter at **@akabruno** and at his blog, **True Faith HR**.

As a result of that realization, Lee was tasked with developing a formal employee value proposition (EVP). She noted that the organization had never focused on this before and that she would have to start from scratch.

Lee and her team know they need to assess what makes an employee experience compelling. They need to gather employees' perceptions of what that experience is. Finally, they will need to use that information to create the EVP and its message.

But where to start? Maybe you've been in the same boat. Maybe someday you will be. Where would you start?

An EVP is a statement in which the total efforts of an organization are brought to the attention of, and delivered to, employees in return for their input. It encompasses tangible items, such as compensation and training opportunities, as well as intangible elements, such as meaningful work and a strong corporate culture. The EVP is critical in explaining why employees stay at an organization instead of seeking work elsewhere.

To assess the employee experience, Michelle could use Twitter to brainstorm ideas from employees about what it means to be part of the organization. A hashtag such as #TPSEVP could be used as a common thread to tie together and hone the message about how work is being lived at TPS.

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Similarly, an internal social enterprise tool, such as Yammer, could be used to get workers to understand what others are doing in that very moment when they find work at TPS compelling. LinkedIn communities within TPS could enable continued conversations; these could be created and serve as focus groups to guide the EVP conversation.

These sorts of online groups could further serve as informal checks on the final EVP before it's formally launched. Another way to learn what employees think about the company — both pros and cons — is to leverage the ability of an HR case management system that allows system administrators to monitor when their company is discussed by employees on a public social media platform, such as Facebook, LinkedIn, or Twitter.

Lee could also create a company blog and highlight recent happenings at TPS, or post about events or stories that particularly capture the attention of TPS employees in the moment. All members of the organization would be welcome to post, providing a view that is transparent and honest.

Lee can also develop a set of videos that would be posted on the company's website or Facebook page that gather employee perceptions of TPS' culture and career-development opportunities.

Similarly, new employees can be sent a short video introduction to the company from their future co-workers and key leaders. The Facebook page could also highlight recent awards won by TPS to create a more holistic view of the organization as more than just another place to work.

Why Is HR Still So Reluctant to Embrace Metrics?

By Ron Thomas

What seems like a lifetime ago, when I was vice president of human resources for a multimedia publication and production business, an employee called my office the day before she was due to return from maternity leave and said she was resigning. This was the fifth person to resign either immediately after giving birth or a few months after returning from leave. When I asked why, she said that because she had been denied the opportunity to come back part time, she had no other choice.

That got me thinking. After further research, which took a few days, we discovered an astonishing trend in our company: All of our young mothers were leaving. Top talent was walking out the door.

Welcome to data analysis.

That was my first foray into metrics. While I used Excel then to painstakingly enter the criteria around all of the resignations, I also had to take a look at the demographics of the company.

How many female employees? How many single? How many of childbearing age, and so on? What I found was that 82 percent of our employee population was female. I also found out that 72 percent of that group was of childbearing age. I also learned that our average female employee was 27 years old.

About Ron Thomas

Ron's background spans many industries and cultures, including technology, media, publishing, banking, insurance, and IT consulting. He is a senior faculty member at the Human Capital Institute, and a certified Master Human Capital Strategist (MHCS), Strategic Workforce Planner (SWP), and Global Human Capital Strategist (GHCS).

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Uncovering employee data, relating it to workplace trends, and finding solutions became my obsession. In this particular case, the solution was to change our work model. We did not offer part-time work then, and we also did not allow employees to work remotely.

Despite those restrictions, we revised our work model to give young mothers an opportunity to design their re-entry back into the workplace. They were required to work out their plan with their manager, and then HR would work with all involved to make it happen.

The end result was that once implemented, we did not lose another young mother within that same time frame after childbirth.

The learning point for all of us is that we have all of this data and we must become obsessed with learning about our employees in the same way marketers learn about consumers. That project got off to a slow start because we had to use the tool that was available, which was Excel. We didn't have the resources and power of today's automated and richly featured HR case management systems to help us learn what employees were concerned about … before it was too late to make a difference.

Still, this led us to create a talent metrics dashboard that showcased trends in these areas:

- Acquisition and onboarding
- Alignment and performance management
- Development and succession planning
- Culture and engagement
- Rewards and engagement

The remarkable thing about this is we are talking early 2000s.

As a blogger, I recently wrote an article about the importance of data and how it's a treasure trove of information that HR is sitting on. You would have thought that I said the wrong thing, from some of the comments left by non-data-loving HR professionals.

Without getting behind data, HR is acting like a marketing team working without knowing the relationship between the products they're selling and their customers. Without sound measurement and data interpretation, marketers lack the ability to judge the effectiveness of their work and speak the language of CEOs, CFOs, and CMOs around the world.

It's like finance not doing modeling scenarios before making financial decisions based on assets or any other investment. The fact is, HR is late coming to the metrics table, but the new level of CEO will begin demanding this type analysis and rigor in making human capital decisions – especially now that HR has the tools to help it do that kind of analysis and support strategic planning.

How Can We Help Solve Real-world Problems?

By Richard Teed

Every HR person and business owner understands the value in improving employee engagement; after all, we want to retain our best and brightest employees. Yet time and time again, we see organizations of all sizes fall into traps that are all too familiar. They lose key people for reasons that could have easily been solved or prevented, if management had only been aware that a problem existed.

There are all these new terms that every application out there boasts of that are supposed to help us: "Data Mining," "Talent Management," "Business Intelligence," "Audit Capabilities," "Manager Dashboards." Meanwhile, the real-world application of the newest technology is not readily apparent. So how do these hot buzzwords help you solve your real day-to-day problems?

The key to solving or preventing these real-world problems is HR analytics – gathering and using key employee metrics to identify problem areas before they escalate.

Standard reports in a fully featured HR case management solution like LBi HR HelpDesk can identify and quantify hidden issues in the workplace.

About Richard Teed

Richard is president and chief operating officer of **LBi Software**. He has over 26 years of application development and project management experience. Richard has managed several large HR ERP upgrades and installations. He has also managed several large multiyear custom-application projects. As president and COO, Richard has led the transformation of LBi Software from a custom development shop to a product-based firm, launching its flagship solution, LBi HR HelpDesk, in 2007. He is also a frequent contributor to LBi's corporate blog and newsletter.

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You can dive into the reports and see patterns of workforce behavior and the reasons for employee dissatisfaction. You can get answers to questions such as:

- What types of employee issues are recurring most frequently?
- Where are the most issues occurring within the organization or in a geographic area?
- Which employee grades are having the most problems?
- Are personnel concerns having a negative impact on overall performance?
- Is there a pattern of dissatisfaction with a particular medical insurance provider or benefit plan?

With an HR case management solution, you can cross-reference all of these data points. You may discover that a drop in production in a specific department correlates with ongoing employee disputes with that department's manager. You may find that the health plan offered to non-managers in Springfield, Ohio, is unnecessarily rejecting claims (you can then investigate why, and perhaps change carriers).

Simply acknowledging that a problem exists makes people feel better. It also could be as simple as providing better, more useful information. What if a quick, graphical view of the manager dashboard (yes, I realize that's one of those buzzwords), or a deeper dive using an ad hoc reporting tool, indicated that a large volume of questions were coming into your HR desk regarding medical items eligible for FSA reimbursement? A simple data-sheet distribution would not only easily solve that problem, it would reduce the burden on your HR staff.

The key is that in addition to the obvious benefits of automating your HR case management (workflow, auditing, and other processes), the data that you capture can help you identify and solve real-world problems. It can help you solve issues before they spiral out of control and perhaps avoid them altogether. LBi HR HelpDesk provides the tools necessary to keep your finger on the pulse of the organization.

The benefits can be heightened with a case management solution that, like LBi HR HelpDesk, is not simply designed by a tech firm. LBi Software has been solving problems for HR since 1986, and we developed our first case management solution in 1992. As a firm with fewer than 50 employees, we are proud that our employee tenure averages more than 10 years. The bottom line is that we understand the value in retaining the best talent, and we share the wealth.

My mentor once told me a long time ago: *"If you solve your clients' problems, you will always have clients."* The same holds true for employees. At the end of the day, it's all about solving people's problems. That's what LBi Software is here to do.

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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, with a unique tiered pricing structure that appeals to companies of any size.

Our organic belief in – and solid reputation for applying – a true client-vendor partnership on every project ensures a highly configurable solution for business with as few as 50 employees or more than 50,000, always 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, Reporting and Analytics.