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Automated HR Case Management:

# **THE BUSINESS CASE FOR THE SMALLER COMPANY**

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# The ROI of HR Case Management for the Smaller Business

When it comes to enjoying the bottom-line advantages of an automated HR case management solution, the Davids of the business world can do as well as the Goliaths, and for many of the same reasons.

Just like their larger enterprise cousins, small and midsize businesses (SMBs) that empower their HR teams and employees with an automated HR case management system can benefit from lower HR costs and increases in efficiency. The business case is especially strong when any user chooses a cloud-based solution with just the right amount of horsepower and features for its needs and size.

This short but information-packed e-book explains why.

The screenshot displays the LBI HR HelpDesk interface. At the top, there is a search bar with a dropdown menu for 'Name (Last, First)' and a 'Search' button. Below the search bar is a navigation menu with options: Main, View My Cases, Knowledge Base, Search Cases, Reports, Utilities, Help, and Logout. The main content area is titled 'Smith, Johnny' and includes an 'Edit Employee Info' button and a 'Notes' tab. The interface is divided into several sections:

- Employee Information:** A table with two columns: Personal and Job. Personal information includes Full Name (Smith, John), Employee ID (1148), Birth Date (01/25/1975), SSN (XXX-XX-3333), Gender (Male), and Marital Status (Married). Job information includes Position (Analyst), Division (Acme North), Location (Corporate), Hire Date (02/02/2009), Retirement Date, and Termination Date.
- Contact Information:** A table with two columns: Home and Business. Home information includes Address 1 (123 Main Street), Address 2 (Apt 555), City/State/Zip (Smithtown, NY 11787), Country (US), Phone ((888) 555-1212), and Home Email (john@gmail.com). Business information includes Address 1 (7600 Jericho Turnpike), Address 2 (Suite 201), City/State/Zip (Woodbury, NY 11797), Country (US), and Phone ((516) 921-1500). There is also a Business Email (jsmith@abccompany.com) and an 'Override Email' link.
- Case History:** A table with columns: Case #, Open Date, Close Date, Division, Category, Subcategory, and Owner. It shows two cases: Case # 316 (Open Date: 04/15/2014, Close Date: Pending, Division: Acme North, Category: Benefits, Subcategory: Dental, Owner: Jones, Mary) and Case # 315 (Open Date: 04/11/2014, Close Date: Pending, Division: Acme North, Category: Benefits, Subcategory: Life, Owner: Jones, Mary). Below the table is a pagination indicator 'Cases 1 - 2 of 2'.
- Case 316 Detail:** A form with various fields for case details. Fields include Open Date (04/15/2014-14:57), Close Date (Pending), Case Received Via (Phone), Length of Call (Not Specified), EE Response Via (Email), Quick Answered (No), Follow-up Date (04/16/2014), Visibility (Confidential), Related Cases (none), Owner (Jones, Mary), Originator (Jones, Mary), Division (Acme North), Category (Benefits), Subcategory (Dental), CC Emails (jsmith@gmail.com), Priority (Normal), and Escalate To (Manager). There are also tabs for Problem, Resolution, Notes, Tasks, and Interactions (0). A text area contains the question 'What is the deductible amount for dental coverage?'. At the bottom, there are buttons for Save, Delete, Mark Closed, Reassign, View Attachments, Show Changes, and Print.

# The Power of Combining Web Access with Self-service Technology

The combination of Web access and self-service technology gives employees the power to answer their own questions and take care of many of their own HR and benefits tasks when they want to and from their own desks – or even from home.

For the bottom line, Web access and employee self-service mean the company is also giving time and resources back to HR. You can allocate fewer HR hours to answering employee questions and managing routine paperwork. And that means more time and resources to focus on strategic business tasks and planning.

- LBi HR HelpDesk Free, Pro, and ProPlus are offered as Software-as-a-Service. Organizations with up to 2,000 employees can launch a cloud-based version of LBi HR HelpDesk and start using it right away.
- An employee self-service portal is included in LBi HR HelpDesk Pro and ProPlus.

The screenshot shows the LBi HR HelpDesk Employee Portal. At the top, there's a header with the LBi logo and the text "HR HelpDesk Employee Portal". Below the header, there are navigation links for "Help", "Print", and "Logout". A welcome message reads: "Welcome to the LBi HR HelpDesk Employee Access Portal". Below this, it says "You are currently logged in as Smith, John." and "You currently have 2 pending cases." There are two buttons: "Click Here" and "Knowledge Base". A section titled "History of Past Cases" contains a table with columns: Case #, Open Date, Close Date, Division, Category, Subcategory, Case Opened Via, Interactions, and Cancel. The table has two rows of data. Below the table, there are fields for "Problem:", "Resolution:", and "Attachments:" with an "Add" button.

-	Case #	Open Date	Close Date	Division	Category	Subcategory	Case Opened Via	Interactions	Cancel
+	316	04/15/2014	Pending	Acme North	Benefits	401k	Phone	Interactions (1)	Cancel
-	315	04/11/2014	Pending	Acme North	Benefits	Life	Phone	Interactions (0)	Cancel

Problem: When will I be eligible for Life Insurance?

Resolution: (none)

Attachments:

# Ease of Use – A Game Changer for the Bottom Line

Studies show that the right self-service system, like that in LBi HR HelpDesk Pro and ProPlus, can accurately address and resolve 80 percent of all employee inquiries. This is particularly significant for organizations that are still operating with a traditional HR department and a manual case-management system or resolution process.

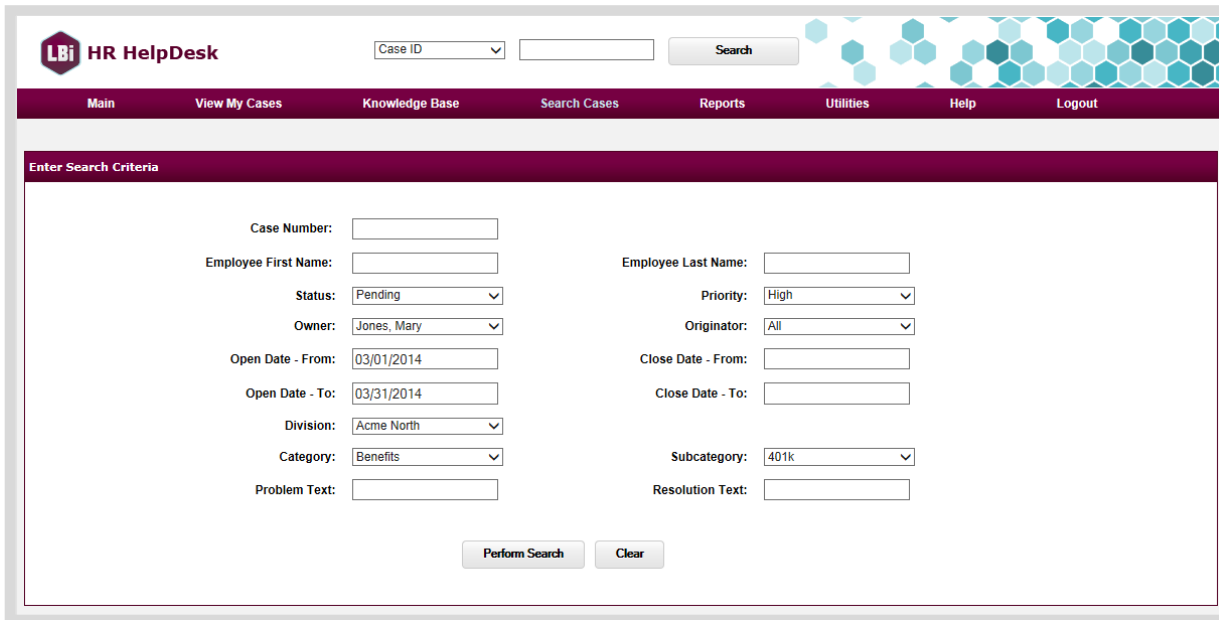
For smaller businesses that still rely on a manual case-management process, the cost savings and the ability to redirect HR staff to strategic issues can justify serious consideration of an automated HR

help desk solution. An automated system can ensure that employees get accurate and consistent information and free HR from the burden of budgeting for staff to handle and resolve inquiries.

The screenshot displays the LBi HR HelpDesk Employee Portal interface. At the top, the title 'Lbi HR HelpDesk Employee Portal' is visible, along with 'Help', 'Print', and 'Logout' links. The main section is titled 'New Case Entry' and contains three dropdown menus: 'Select your Division:' (Acme East), 'What type of problem are you having?' (Benefits), and 'Please be more specific.' (401K). A 'View Additional Documentation' button is located to the right. Below this is a section titled 'Common Scenarios That May Match Your Issue' with a list of options: 'Company Match', '401k Deduction Amount Changes' (highlighted), '401K % Change', and 'Vesting'. To the right of this list are two text boxes: 'Problem' (containing 'How do I change my deduction amount?') and 'Resolution' (containing 'Submit a 401k Change Request form to hr@helpdesk.com.'). The next section is 'Enter A Description Of Your Problem' with a large text area containing the text 'When am I eligible to enroll in the 401k plan?'. At the bottom, there are two more dropdown menus: 'Do you have any files to attach to this case?' (No) and 'How would you prefer to be contacted upon case resolution?' (Email). 'Send' and 'Cancel' buttons are at the very bottom.

# Other Key Features That Increase Ease of Use, Improve Accuracy, and Reduce Hassle and Costs

The employee self-service portal found in LBi HR HelpDesk Pro and ProPlus is one feature that makes life easier for employees and helps HR be more productive and cost-effective.



The screenshot displays the LBi HR HelpDesk search interface. At the top left is the LBi HR HelpDesk logo. To its right is a search bar with a 'Case ID' dropdown and a 'Search' button. Below the logo is a navigation menu with links: Main, View My Cases, Knowledge Base, Search Cases, Reports, Utilities, Help, and Logout. The main content area is titled 'Enter Search Criteria' and contains a grid of search filters. The filters include: Case Number (text input), Employee First Name (text input), Employee Last Name (text input), Status (dropdown menu with 'Pending' selected), Priority (dropdown menu with 'High' selected), Owner (dropdown menu with 'Jones, Mary' selected), Originator (dropdown menu with 'All' selected), Open Date - From (text input with '03/01/2014'), Open Date - To (text input with '03/31/2014'), Close Date - From (text input), Close Date - To (text input), Division (dropdown menu with 'Acme North' selected), Category (dropdown menu with 'Benefits' selected), Subcategory (dropdown menu with '401k' selected), Problem Text (text input), and Resolution Text (text input). At the bottom of the search criteria section are two buttons: 'Perform Search' and 'Clear'.

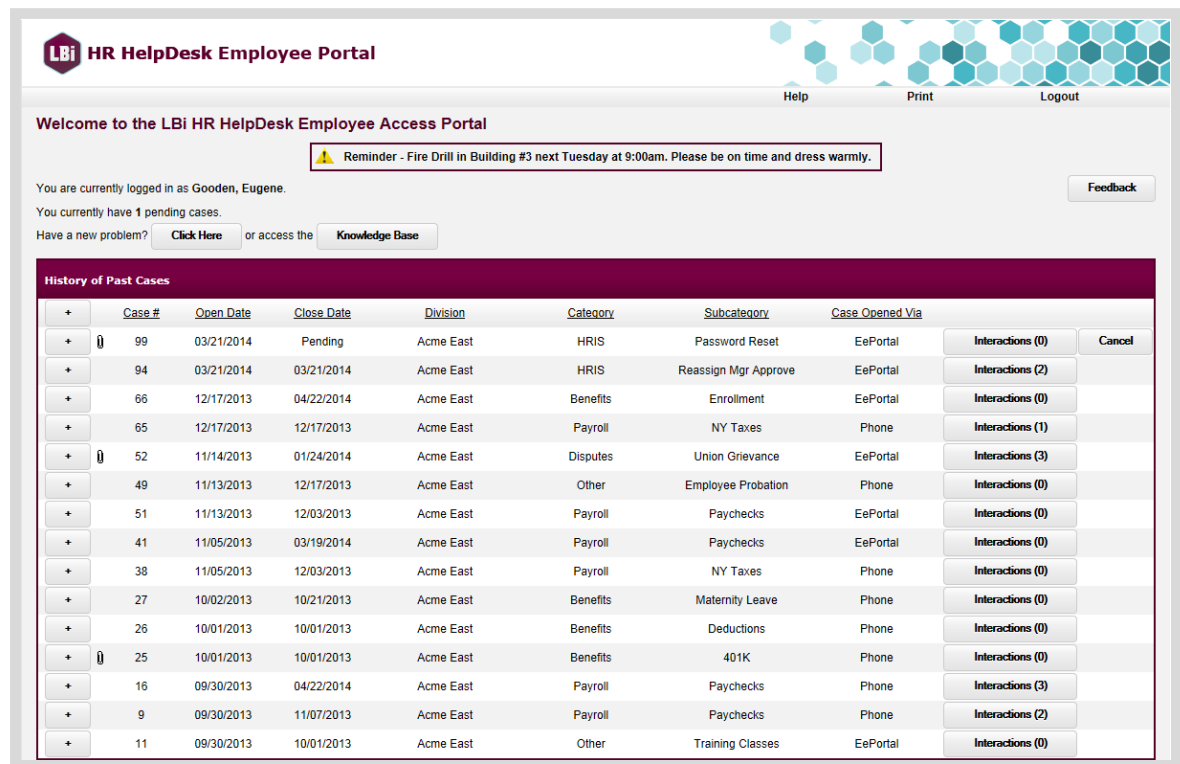
Several other features that contribute directly to easier HR case management for employees and HR staff are available in all versions of LBi HR HelpDesk. These include:

- Mobile browser capability
- Employee interactions and notifications via email
- Automatic escalation of cases
- User-defined tasks
- Advanced search and query functions
- Linking multiple cases
- Attaching supporting files and documents directly to cases

# The Big Value of Comprehensive Case Management

In essence, an automated HR case management system centralizes and links many, if not all, of the manual actions and hard-copy paperwork that resolving any employee case might involve.

The day-to-day, as well as bottom-line, impacts for HR can be huge.



**LBI HR HelpDesk Employee Portal**

Welcome to the LBI HR HelpDesk Employee Access Portal

You are currently logged in as Gooden, Eugene.  
You currently have 1 pending cases.

Have a new problem? [Click Here](#) or access the [Knowledge Base](#)

**History of Past Cases**

	Case #	Open Date	Close Date	Division	Category	Subcategory	Case Opened Via		
+	99	03/21/2014	Pending	Acme East	HRIS	Password Reset	EePortal	Interactions (0)	Cancel
+	94	03/21/2014	03/21/2014	Acme East	HRIS	Reassign Mgr Approve	EePortal	Interactions (2)	
+	66	12/17/2013	04/22/2014	Acme East	Benefits	Enrollment	EePortal	Interactions (0)	
+	65	12/17/2013	12/17/2013	Acme East	Payroll	NY Taxes	Phone	Interactions (1)	
+	52	11/14/2013	01/24/2014	Acme East	Disputes	Union Grievance	EePortal	Interactions (3)	
+	49	11/13/2013	12/17/2013	Acme East	Other	Employee Probation	Phone	Interactions (0)	
+	51	11/13/2013	12/03/2013	Acme East	Payroll	Paychecks	EePortal	Interactions (0)	
+	41	11/05/2013	03/19/2014	Acme East	Payroll	Paychecks	EePortal	Interactions (0)	
+	38	11/05/2013	12/03/2013	Acme East	Payroll	NY Taxes	Phone	Interactions (0)	
+	27	10/02/2013	10/21/2013	Acme East	Benefits	Maternity Leave	Phone	Interactions (0)	
+	26	10/01/2013	10/01/2013	Acme East	Benefits	Deductions	Phone	Interactions (0)	
+	25	10/01/2013	10/01/2013	Acme East	Benefits	401K	Phone	Interactions (0)	
+	16	09/30/2013	04/22/2014	Acme East	Payroll	Paychecks	Phone	Interactions (3)	
+	9	09/30/2013	11/07/2013	Acme East	Payroll	Paychecks	Phone	Interactions (2)	
+	11	09/30/2013	10/01/2013	Acme East	Other	Training Classes	EePortal	Interactions (0)	

# Features That Create Comprehensive Case Management

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To see how comprehensive case management can transform HR for smaller enterprises, consider several features designed for that purpose that are included in every version of LBi HR HelpDesk.

**Consolidated case entry** – simplified by populating fields with data automatically drawn from existing HR systems (available on all versions of LBi HR HelpDesk)

**Case histories** – with summaries of prior transactions, including telephone calls (available on all versions of LBi HR HelpDesk)

**Common problems knowledge base** – easily searchable common questions and appropriate answers to resolve cases for HR and employees, increasing first-call resolution and reducing case escalation (available on LBi HR HelpDesk Pro and ProPlus)

**Document repository** – customizable for storing and organizing commonly used forms, documents, and reference materials in folders and subfolders for a variety of file types (available on LBi HR HelpDesk ProPlus)

**Full audit trail** – a complete trail of cases and resolutions, with reporting available on relevant statistics, date and time of resolution, HR specialist involved, and days outstanding (available on LBi HR HelpDesk Pro and ProPlus)



# Getting Down to Brass Tacks:

## Calculating the ROI of an Automated HR Case Management Solution

Even if you're using a manual process without a true HR call center, you can estimate the return on investment (ROI) of an automated HR case management solution. You simply need to calculate your current cost per call (or case) and run a comparison against the costs of buying and operating a solution such as LBi HR HelpDesk.

### Step 1: Determine Your Cost per Call or Case:

Your cost per call (or case) is the cost of a call arriving at your call center and being handled by your help desk or HR staff member.

There are several ways to calculate this. Here, we focus on the basic cost per call. It's the easiest for most non-enterprise organizations, that aren't using a staffed call center.

#### Basic Cost per Call

*Calculation: HR Staff Member's Hourly Wage ÷ Calls per Hour*

### Step 2: Determine the Costs of an Automated HR Case Management Solution

Each version of LBi HR HelpDesk is available for a free trial of at least 30 days. This gives you the time you need to determine not only which version is right for your organization, but also to measure the cost per call or case using LBi HR HelpDesk Free, Pro, or ProPlus.

At the end of the free trial periods for LBi HR HelpDesk Pro and ProPlus, you can purchase the version you've tried or buy another option, with discounted rates for annual billing starting at \$1,530 per year. You can use the annual billing rate to compare your projected ROI against the cost of continuing to manage your HR cases manually or with a fully automated call center.

- **LBi HR HelpDesk Free** – Basic issue-resolution workflow for up to 100 employees and two administrative users. No expiration date.
- **LBi HR HelpDesk Pro** – An expanded version for up to 500 employees and 10 administrative users. Free for 30 days.
- **LBi HelpDesk ProPlus** – A fully featured version for up to 2,000 employees and 20 administrative users. Free for 30 days.

# Ready to Make the Case for Case Management and Transform HR?

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LBI's new approach to putting HR case management in the hands of non-enterprise users offers basic, expanded, and fully featured versions of LBI HR HelpDesk – not merely stripped-down varieties of the company's robust enterprise platform.

**Contact us today** to learn more about how we are putting the power of automated HR case management in the hands of smaller businesses and how we can help you prove that it's well worth the relatively modest investment.

**Start Your Free Trial Now!**

**Sign Up ▶**

or

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**Learn more** about LBI HR HelpDesk Free, Pro, and ProPlus – and how to begin transforming HR in your organization.

**Learn More ▶**

## About LBi Software



### LBi Software

[www.lbisoftware.com](http://www.lbisoftware.com)

999 Walt Whitman Road  
Melville, NY 11747

Call: 516.921.1500  
Fax: 516.921.1897

**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 organizations 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 businesses 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.

LBi Software is headquartered in Melville, N.Y., and is online at [www.lbisoftware.com](http://www.lbisoftware.com).