

Perspectives



Score an HR technology victory: key steps to build a strong HR portal business case

Chris Keys

For many in Human Resources, the phrase “business case” invokes feelings of dread, while for others it is just one more item to check off their to-do lists. Undoubtedly, the phrase comes with expectations around format, impact statement, prevalence of hard dollar calculations and more. There will be must-see words, as well as taboo topics.



A business case for an HR portal adds one more twist – a potentially blurred identity. Is it first and foremost a piece of software, or is it an HR communication and service delivery framework?

This dilemma pervades every business case for an HR portal. Very quickly discussion surfaces as to whether an HR portal is a software purchase, or whether its success is tied to an overhaul of how HR communicates to and serves employees. We offer several key principles to consider when creating such a business case.

1. Align HR portal business case to HR goals

What defines success? Is it a great software design and implementation with a defined software support model, or is it a consistent pattern of enhanced HR service delivery? These pivotal questions set the stage for a business case, namely aligning to HR and even corporate objectives.

- If you have a stated HR goal to reduce costs, then an HR portal fits right in. An HR portal makes information easier to find and readily available, and you can measure the number of phone calls for support that are completely deflected away from a service center.
- If you have a stated HR goal to enhance the employee experience, then once again an HR portal completely dovetails with that objective. An HR portal, and specifically, deep personalization of consumable content and ease of access directly into transactional systems, foster alignment.

It's quite feasible to align your business case for an HR portal to known goals around costs, operations, experience, globalization, collaboration, mobility, adoption, growth and more. In fact, this can significantly impact the initial impression of your business case.

2. Balance tangible and intangible measures

An HR portal is not a transactional system, so unlike traditional HR technologies, you cannot measure its impact by reduced error rates or increased execution speed. There are a number of hard dollar measures, including:

- Infrastructure consolidation by sunseting several internal websites (including test environments) into one HR portal
- Elimination of paper distribution channels and saved postage, including regulatory notices
- Reduced salary costs driven by fewer phone calls and other-channel support
- Decreased support costs created by HR's self-sufficiency in content creation
- Time saved by employees searching for information (increasing productivity)

Key steps

- Align HR portal business case to HR goals
- Balance tangible and intangible measures
- Less is more, more or less
- Identify an executive champion, and don't underestimate change management
- Deliver and commit to reevaluate the business case

There is a complementary list of experience and engagement measures that are just as impactful, even if harder to measure. These more intangible measures often strongly align to employee and leader desires, and can add much weight to a business case. The following are examples:

- Enhanced employee experience, and indeed a "New Face of HR"
- Single point of access to HR information
- Raised awareness of existing plans and programs (and the resulting impact on employee behavior)
- Ease of access and consumer-grade experience on mobile devices
- Rich personalization to target content to new hires, managers and leaders, among others, and according to demographic profile, program eligibility, communication preferences and more

- Change management support for new HR technologies, or during M&A activity
- Enhanced experience and increased adoption of employee self-service and manager self-service transactions
- Improved service delivery model through a combination of communication channels and case management
- Increased impact on employee engagement overall, including targeted messaging and information to population segments based on the analysis of survey data

3. Less is more, more or less

The presentation of a successful business case belies the breadth and depth of the preparation that went into developing it. A much-used outline includes an executive statement, goal alignment, implementation and measurement milestones, and a success story from a similar organization that embraced a similar project.

However, the approach to arriving at the final presentation is critical.

- Assemble the details on software implementation, including timelines, resource commitments, and interplay with other initiatives, dependencies, costs and risk. These are the important software implementation dimensions.

Sometimes an organization has a tried and true global model of collaboration, and an HR portal is another effective tool to offer.

- Engage the right stakeholders and explore potential changes to HR service delivery. Does the portal offer emulation capability that enhances support? Does the service center need training? How will the service center have ongoing input to portal content emphasis in order to impact information availability and contact volumes?
- Engage HR communications or corporate communications and create value statements and buy-in to new processes and features.
- Engage a vendor management leader or leaders and confirm availability of single sign-on and deep linking into transactional systems, as well as high-level ideas on what content might move from a vendor site or system into the HR portal.
- Fully explore the technical side of access, meaning authentication and off-network (mobile device) access to the new HR portal.
- Ensure there is a solid support model for both software and communications/content assistance on an ongoing basis.

Once these pieces are in hand, review everything with a trusted partner to ensure they are reasonable and complete, and also identify an executive champion.

4. Identify an executive champion, and don't underestimate change management

An executive champion is critical to success, and it's never too early to start to identify a promising candidate. By the time the final business case is ready, nothing should be "new news" to your champion. In addition, an HR portal often introduces new governance needs across HR that make it necessary for geography or process owners to collaborate more closely on consistently leveraging this new communication channel. An executive champion can lead this change from the top.

Sometimes an organization has a tried and true global model of collaboration, and an HR portal is another effective tool to offer. Alternatively, considerable work may be needed to agree to the concept of an HR portal as a communication channel, to agree on content ownership, or to agree on an ongoing dialogue and commitment to continued measures and service improvements. These changes do not come easily, requiring input from a broad spectrum of content owners, process experts, service delivery leaders, policy owners, country and regional representatives, and more.

As your business case comes together, the executive stakeholder can champion the socialization needed in all these areas so that the final business case considers the need for change leadership for both implementation and sustained engagement.



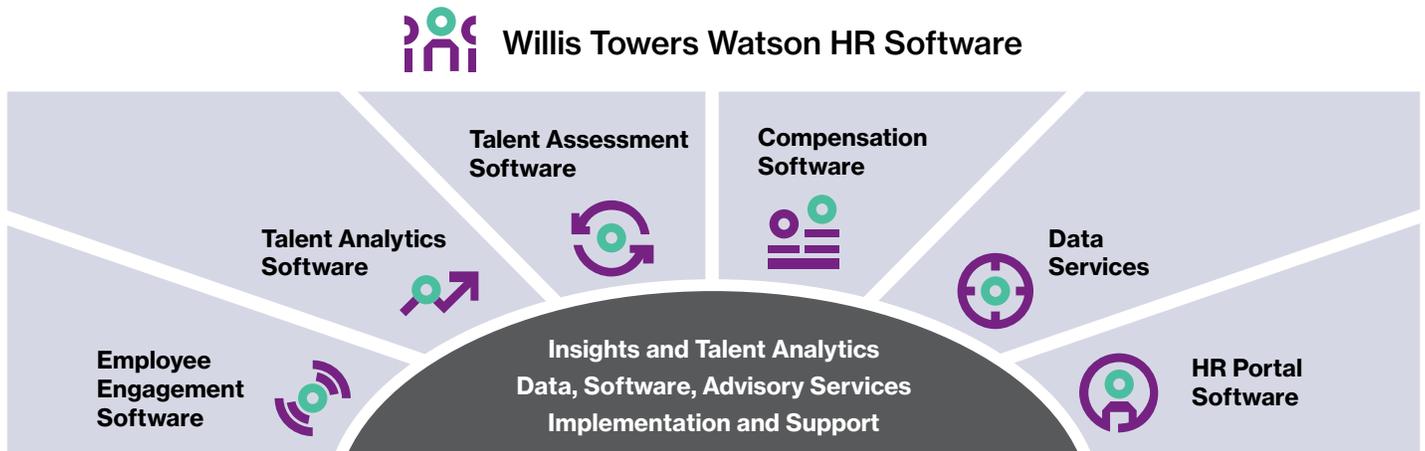
5. Deliver and commit to reevaluate the business case

The presentation of your business case should also include a commitment to revisit it over time. If you have taken a three- or five-year perspective, the business environment will likely change, leaders may move on or there may be a need to explore partner service levels. These are all legitimate reasons to revisit and reinvigorate the business case for continued success.

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