

Taking information into your own hands

Critical issues in the design and implementation of employee self-service



An IBM Institute for Business Value executive brief

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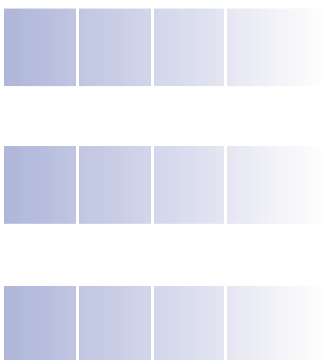
Introduction

How can an organization empower its employees, reduce costs and improve data quality all at the same time? Implementing employee self-service tools is one direction that a number of leading companies are turning to as they look to build win-win propositions with their most important assets: their people. By enabling employees to obtain information and process transactions without human intervention, organizations can begin to streamline workflow and lower expenses while, at the same time, enhancing the services provided to their employee population.

As margins continue to erode in many industries, there is significant pressure on executives to significantly lower administrative expenses. This includes reducing the costs and cycle time associated with managing employee transactions. At the same time, however, most senior leaders recognize the value of their employee assets and understand the importance of providing services that allow their employees to be engaged, productive and satisfied with their work environment.

Simultaneously, employees are looking for ways to improve their ability to manage their personal information and interact with the larger corporation. For one, they are looking to have more control over their time. In juggling increasing workloads with greater work-life demands, employees no longer have the time to spend filling out forms or waiting on hold for overworked service representatives. Not only do employees want to reduce the time it takes to conduct basic transactions, they want to be able to perform those activities when and where it is most convenient for them to do so.

Employee self-service is, for many processes, achieving mainstream deployment in organizations. Two recent studies have highlighted the increasingly widespread deployment of self-service across a range of employee processes.¹ These studies indicate that 70-90 percent of companies will have self-service enabled HR processes such as benefits enrollment, time and expense management, training enrollment and personnel records management this year. As employees become more accustomed to using self-service technologies, there are numerous opportunities to both expand the use of these tools and further incorporate them into day-to-day corporate life.



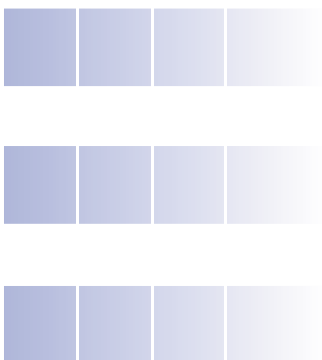
While firms are making notable strides in enabling employees through Web-based self-service applications, few have begun to consider the needs of employees who do not have regular access to personal computers as part of their daily jobs. We believe that addressing the needs of these groups is critical as they often reflect large percentages of the overall employee population. In this Executive Brief, we provide a framework for understanding the self-service needs of different types of workers and highlight potential scenarios for addressing their needs.

Finally, based on our experience in working with a range of clients on their self-service needs, we provide some lessons learned regarding the design, implementation and maintenance of self-service systems. While the technology used to provide access to information plays an important role, we have found that there are significant change management issues that must be addressed for firms to see a return on their investments in this area. Incorporating self-service into the daily activities of large numbers of employees requires companies to think about how to motivate individuals to use these new systems and support them during the transition to a new way of working.

Employee self-service can take many forms

Employee self-service encompasses a wide variety of applications that allow employees to perform a number of work-related tasks that previously required a human intermediary. While the best known use of employee self-service has focused on traditional human resources administrative processes, many companies have also begun to use self-service to support areas such as employee education, IT help desk, expense management, research services and procurement. Overall, we see four primary types of employee self-service capabilities, which are summarized in the following table:

Employee self-service capability	Description	Example
Obtain forms	Enable employees to order or print their own forms	<ul style="list-style-type: none"> Obtain a Leave of Absence form from the organization's intranet
Obtain personal information	Allow individuals to obtain employee-specific information	<ul style="list-style-type: none"> Check vacation days by calling a voice response unit Obtain a balance from a retirement account using an employee portal
Conduct transactions	Enable employees to initiate or make changes to individual accounts and profiles or to conduct internal transactions	<ul style="list-style-type: none"> Enter and track time billed to a specific project Change the number of employee dependents Change surname due to life event Enroll in an employee share purchase plan Record travel expenses
Obtain advice and decision support	Allow employees to engage with a knowledge base to improve personal decision-making	<ul style="list-style-type: none"> Develop potential retirement scenarios using pension and other sources of retirement income Take an online wellness survey to determine potential health risks Identify individual career development gaps and opportunities



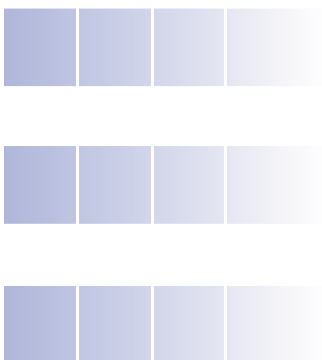
Organizations often employ a mixture of these capabilities when enabling a specific process. For example, an employee who would like to purchase shares of company stock might download a brochure that describes the program, its benefits and its length of service requirements. By printing out the document, the employee can read about the program without being tethered to a terminal and can bring the document home to discuss with a spouse or financial advisor. The brochure provides a Web link to an intranet site where the employee can register for participation in the program. Once the account is initiated, an employee can then perform a variety of tasks, including checking the balance of their account, changing their contribution levels and selling shares. In addition, the company provides a retirement planning application, where the individual can access data from a variety of sources, including his company shares, to make informed decisions about retirement issues.

Cost savings are an important driver for the development of employee self-service

Organizations have undertaken the challenges of deploying self-service technologies to achieve a range of tangible and intangible benefits. For many companies, the primary rationale for investigating the use of self-service is reduction in HR administration costs. In one recent study, over 40 percent of companies identified cost savings as the primary rationale for implementing employee self-service.² These cost savings can take a number of forms, including reduction in data entry costs, service center calls, and postage and forms management.

Reduction in data entry costs

Employee self-service can significantly reduce the amount of data entry that needs to be performed for ongoing transactions, such as changes to employee status or payroll changes. For example, Wellpoint Health Networks, a provider of healthcare services with 17,000 employees, found that self-service could radically reduce the amount of paperwork being processed by the HR department. By enabling employees to see benefit options, update personal information, and view pay history and 401K information online, and by allowing managers to administer pay increase and title changes and complete employee reviews online, the company was able to reduce the amount of paper it received from 63,000 pieces to 1,100 pieces annually.³ Similarly, the McData Corporation, a provider of data storage and networking solutions with 1,000 employees, found it was able to reduce the amount of paper handled by its HR department by 80 percent, allowing the department to avoid hiring six extra individuals while, at the same time, reducing data errors.⁴ In addition to processing regular activities, self-service could also reduce the number of temporary workers needed to process yearly events, such as benefits enrollment and safety certifications.



Reduction in service center calls

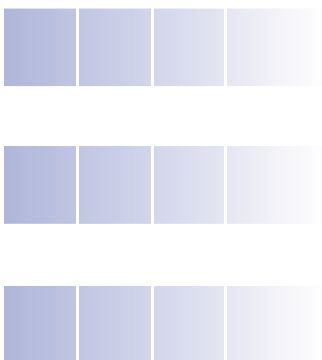
As employees are able to obtain answers to routine questions on their own, the number of calls handled by an organization's centralized human resource service center can drop dramatically. Estimates from several of our client projects indicate, and outside surveys have reported, that self-service technologies can reduce the volume of general inquires received by an employee service center by 30-50 percent.⁵ In addition to an overall reduction in call volume, self-service technologies can have short-term and long-term impacts on the type and length of calls received by a supporting service center. In the short term, the length of time per call may increase, as representatives need to guide new users in using the newly implemented self-service features. In the long term, however, more of the remaining calls to the center will be more complex in nature, and require a greater amount of skill and experience in addressing the issue. This will have an impact on the call center's staffing levels, skill mix and training programs.

Reduction in postage and forms management

Cost improvements can also be achieved through more efficiently managing the significant number of forms and mailings that are often sent to employees. For example, Public Service Energy Group (PSEG), a major utility employing 11,000 employees, found it was able to save over US\$350,000 a year in costs for printing and mailing benefit enrollment materials.⁶ Similarly, the IBM Corporation, with over 330,000 employees worldwide, has been able to save over US\$650,000 annually in mailing and distribution costs through its online benefits enrollment efforts.

When these three areas of cost savings are combined, the results can be significant. A recent study by The Cedar Group, an advisory and consulting firm, suggests that transitioning from a manual to a self-service process could provide cost savings to an organization similar to that shown in the following table:⁷

Process	Manual process costs per transaction (US\$)	Self-service cost per transaction (US\$)	Percent savings
Benefits election	109.48	21.79	80%
Change in contact information	12.86	3.39	74%
Enroll in training	17.77	4.87	73%
Approve a promotion	48.64	18.26	71%
Create a job requisition	36.89	11.11	70%
Change salary	44.67	18.26	59%
Apply for a job	21.31	11.85	44%



Going beyond cost

Although employee self-service applications can have a noticeable impact on service delivery costs, they can deliver a number of important intangible, though no less important, benefits. These include those benefits that accrue to specific individuals using the tools and those that are realized at an organizational level.

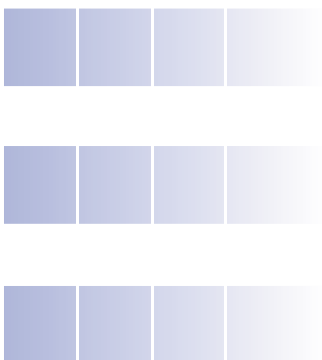
Benefits to the individual

Self-service can provide a number of important intangible benefits to individuals: speed, responsiveness and convenience. Using self-service, employees are often able to obtain answers to questions faster than working through a human intermediary. Simple inquiries for information on vacation days, retirement savings, job postings and the like can be delivered without employees having to send an e-mail or wait on the phone for a human representative. In addition, self-service provides employees with the opportunity to obtain information at times when it is convenient for them and in a language they are most comfortable with. This is particularly important for individuals who work for companies where assistance in multiple languages may not be available on an around-the-clock basis.

In addition to faster responses, employee self-service also allows easier access to a wider range of information, enabling individuals to make more effective work-related and personal decisions. For example, an individual with access to an employee course catalog can quickly identify online courses that could help them address a short-term educational need, while at the same time providing them with a longer-term roadmap for career development. Similarly, by providing services such as retirement calculators and health benefit comparisons, companies are giving individual employees the opportunity to take greater control over their personal finances and healthcare choices. In each of these scenarios, self-service can help facilitate access to information that can help employees make better-informed, cost-effective decisions.

Benefits to the organization

The benefits of employee self-service for the organization go beyond simple cost savings. For many organizations, self-service can enable the reallocation of time and resources that human resources and other professionals spend servicing routine inquiries. As many HR organizations are looking to focus their time and attention on more strategic issues, such as talent and performance management, employee self-service is one way to refocus employee attention around higher value challenges and spend less time dealing with easily handled, repetitive inquiries.

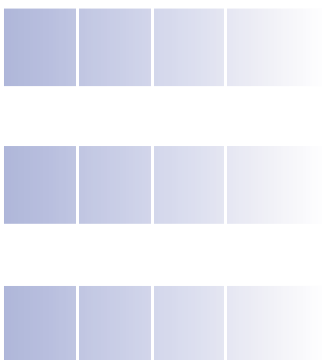


However, this refocus of time and attention does not have to come at the expense of internal customer satisfaction. In fact, an HR organization that is able to significantly reduce its call volume through the use of self-service channels can also simultaneously improve the perceived levels of service received by the customer. For example, if employees can avoid using a shared service center (and the associated wait time spent on the phone) while at the same time receiving similar or, in some cases, better quality answers, this can be perceived as mutually beneficial. While effective employee self-service does not eliminate the need for an employee contact center, it can help reposition the center as a source for addressing specialist inquiries in a collaborative manner.

A third important benefit to an organization is an improvement in data quality. In an employee self-service model, the responsibility for individual data management is visibly shifted from the corporation to the employee. Since employees (and in some situations, their managers) are much more aware of the key events that trigger data changes (e.g., marriages, births, job transfers, promotions) they are in a much better position to help ensure that their data is as accurate and up-to-date as possible. This shift in data stewardship not only helps ensure that the data directly impacting the employee is accurate, but that the data collected by the organization for reporting and analysis purposes is more accurate as well.

Understand the need for different channels of self-service delivery

Much of the discussion associated with employee self-service has focused on the use of a company's intranet as the primary tool for interaction. However, this model assumes that employees are comfortable working with computers and have easy access to machines with Web access. This can be a very dangerous assumption. In many organizations, important employee populations often do not have access to Web-enabled personal computers throughout the day. This includes groups such as retail workers, delivery personnel, sales representatives and manufacturing employees, among others. Depending on the industry, the percentage of workers who fall into these categories can be significant. For example, a recent study suggests while 88 percent of salaried workers in the manufacturing sector have access to an HR Web site at work, only 56 percent of hourly employees in this sector have this ability.⁸

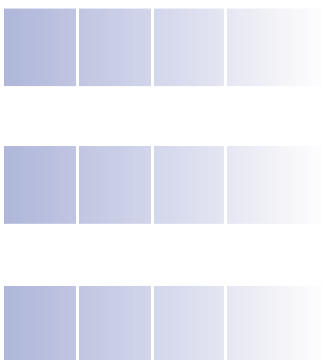


Furthermore, environmental conditions such as noise, privacy and physical space may make personal computer usage difficult. Connectivity may also be a challenge, as employees using a computer that does not have a direct connection to a high-speed network may find it difficult to investigate HR policies or make changes to a system in a timely and convenient manner. Finally, varying degrees of computer literacy, especially for workers who do not interact with a computer on a regular basis, may create the perception that self-service is too difficult and time-consuming to provide benefit to the employee.

These barriers represent real challenges to achieving the full benefit of employee self-service. Not only are workers who are unable to access self-service more likely to revert to previous sources of HR information (such as managers or local HR staff), they can be easily demoralized by what they perceive as the organization's inability to address the needs of the entire workforce, not only those working with personal computers. However, for each of the audience groups that do not work in a traditional office environment, there are a number of alternative solutions for providing employee self-service. Using a mixture of new and existing technologies, these solutions can provide practical alternatives to using traditional HR portals and allow a wider range of employees to obtain information and conduct transactions.

Based on the issues described above, it is quite clear that companies cannot take a simple "one-size fits all" approach to delivering employee self-service. To best determine the channels that should be employed to support different employee groups, four important dimensions should be considered:

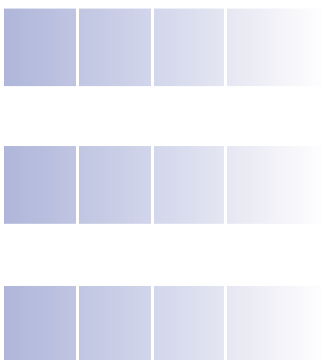
- *Device availability:* Different employee populations have access to different sets of information technology tools to do their regular jobs. In some situations, large groups of employees will have access to networked personal computers; in others, they may only have access to a mobile or fixed telephone. Understanding these differences is necessary to ensure that information can be delivered to, and obtained from, the appropriate channel.
- *Employee mobility:* In addition to understanding what device individuals use to access information, firms need to consider where individuals spend most of their work day. Employees who spend a significant time away from the office may have limited opportunities to obtain information from a fixed personal computer in an office. Therefore, asking them to spend this limited amount of time obtaining self-service information could prove to be frustrating barrier for many of these employees.



- *Primary physical environment:* As stated earlier, many work environments may not be conducive to performing self-service functions. For example, the noise and dust associated with a large construction site or manufacturing facility might make the use of a regular PC difficult and result in potential system downtime and user dissatisfaction. Therefore, firms need to recognize the potential limitations associated with the physical facilities where employees would be expected to access their self-service systems.
- *Level of computer literacy:* Employees who might not use personal computers on a regular basis may be inhibited from using a system, particularly if system use requires them to perform actions quickly while others are waiting. Also, the level of computer literacy has implications for the design of the user interface and subsequent training and support requirements necessary to assist users.

A framework for determining appropriate self-service channels

	Device availability	Employee mobility	Primary physical environment	Level of computer literacy	Alternative self-service channels
Desktop connected employees	At desktop	Low	Conducive to computer-related work	High	Personal computer access at home
Dispersed employees (e.g., convenience store)	Limited to point-of-sale (POS) systems or manager	Low	Shared space with customers	Varied	Fax machine; kiosk; personal computer access at home
Mobile employees (e.g., delivery personnel)	Personal computer usage limited to visits to home office/depot; access to mobile phones as part of the job	Constant movement between locations	Primarily in vehicle	Varied	Mobile telephone, personal computer access at home
Shop floor employees (e.g., assembly workers)	Personal computers may be available in home or break room; potential kiosk availability	Low	Production materials, noise and privacy issues may impact usage	Varied	Kiosk, personal computer access at home



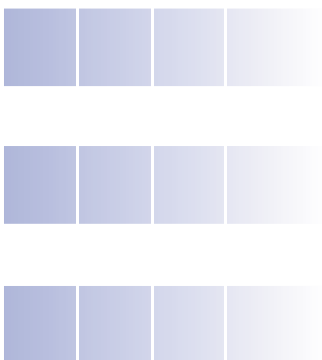
When looking across these dimensions, four distinct employee segments emerge, each with its own set of self-service requirements. In the next section, we examine how firms can provide better self-service capabilities for the employee segments that may not regularly use personal desktop systems as part of their daily routine.

Providing self-service for dispersed employees

Employees who are working at remote locations, such as a retail convenience store, may have limited access to a personal computer where HR information can be obtained. Often, if there is a personal computer at the site, it is located in a manager's office and is often used for a variety of other functions, such as payroll, ordering supplies and the like. However, many locations have a fax machine available that can be used to deliver and confirm a variety of HR transactions.

For example, a convenience store clerk who has recently had a child could request a Benefits Change Form, either by obtaining a form in the store or calling an automated number that sends the appropriate form to a fax machine. Depending on the level of automation, the form may be pre-filled with existing employee data. She could then fill the required fields in by hand or, alternatively, circle the sections of interest. Once the form is completed, the store clerk could then send the fax back to a service center. At the center, the form is then scanned using optical character recognition (OCR), matched with a record of existing employee data, and the appropriate change made in the human resource information system. The result of the request can be faxed or mailed back depending on the user preference. Authentication of the sending user, if needed, can be done in a variety of ways, using employee ID cards, PINs, biometrics and/or online signature verification. Confirmation can then be faxed back to the employee when the transaction is completed.

There are multiple advantages to using a fax machine in environments where there is low connectivity, low personal computer availability and limited experience working with computers. Since many employees have access to a fax machine (which may or may not be equipped with some form of security feature to validate the user), this method can offer a relatively low-cost/low-bandwidth alternative. Paper forms are relatively easy to complete, though handwriting clarity can have an impact on the effectiveness of the scanning technology. Furthermore, the employee is able to maintain an original record of the transaction, and its subsequent confirmation, throughout the process. From an organizational standpoint, the company is able to significantly reduce manual data entry, while, at the same time, improving data capture and reporting.

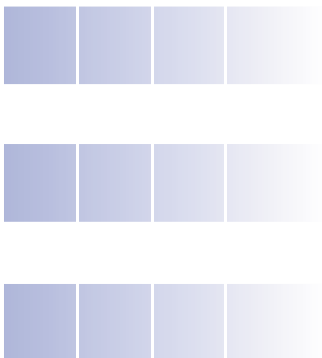


Providing self-service for mobile employees

Employees such as postal delivery workers, truck drivers and field engineers spend little, if any, time near a personal computer. Even the beginning and end of shifts are often taken up with material handling, invoice management, safety briefings and other activities that make it difficult to find time to use a shared personal computer. However, many workers have access to wireless and/or handheld devices, such as mobile phones, that can be used to obtain self-service information and conduct basic transactions. Research shows that mobile phones continue to play an increasingly important role in the day-to-day work activities of these workers, serving as a primary conduit for capturing information and communication with others in their organization.⁹ In addition to voice capabilities, the increased use of short message service (SMS) has become more prevalent, particularly in Europe and Asia. SMS technologies, which allow individuals to use a keypad on a mobile phone to produce brief text messages, can allow employees to send simple queries or notifications from any location at any time. This channel provides relative privacy and requires simple authentication using one's phone number, PIN (or Subscriber Identity Module (SIM) card in the phone), or corporate password.

An example of this might be a telecommunications field engineer who is interested in checking his vacation account. By using the text messaging feature on his phone, he types in "Vacation Status" and sends it to a corporate account. A few seconds later, he is prompted for a password, which he then supplies. Several seconds later, he receives a short message, detailing his available vacation days, carry-over days and the days that must be used by the end of the year. In situations where SMS adoption is not high, this information could also be delivered using interactive voice response technology.

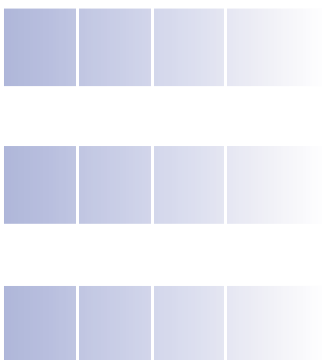
This type of mobile phone-based self-service holds a number of potential advantages for employees and organizations. Since, for mobile positions, many companies either provide mobile phones or employees already have them, there is little additional expense needed for installation, maintenance or upgrades. Also, only a limited amount of training is necessary to explain how to use the device to obtain information, as it uses the current functionality of the device. Using these technologies can also facilitate multilingual requirements for employees working within global companies.



Providing self-service for shop floor employees

Many employees work in environments where they do not have access to personal computers or do not use them as a tool to accomplish their jobs. However, addressing their self-service needs is no less important, especially when these workers make up a significant percentage of the employee population. To address the needs of this group, there are a number of potential options. One is the use of kiosks. A kiosk typically comprises a touchscreen operated personal computer with a number of peripherals, such as printer and scanner, card readers, camera, microphone and speakers, and the like. The personal computer, screen and peripherals are all assembled together in a case that protects the personal computer from outside contaminants. The kiosk can be configured to deliver a specific series of applications by eliminating the mouse and/or using a virtual keyboard, by disabling key combinations (e.g., Alt-Ctrl-Del), and by removing applications and/or blocking addresses. While the use of kiosks in a human resources setting is not new, the advent of lower-cost models with greater functionality has increased their deployment in a variety of settings, including hospitals, and metals and electronics manufacturing. More recently, kiosks are starting to incorporate leading technologies such as fingerprint and iris-scanning technologies to improve security in public areas, and speech recognition to reduce the need for keyboards or touchscreens that can wear out with heavy usage.

However, kiosks can have a number of limitations, including the amount of time employees actually have during the day to use the kiosk and privacy issues associated with accessing potentially sensitive information in an open environment. For many workers, including dispersed and mobile workers, access to employee self-service via home personal computers may be a preferred option. Although there may be a perception that retirees, more mature workers or workers who do not have access to a personal computer at work may be less comfortable working with a computer at home, research has begun to suggest otherwise. A 2003 study of more than 3,000 European consumers over 55 years old found that more than 20 percent bank online, almost 30 percent send instant messages and 42 percent read news or information sources.¹⁰ Overall, this suggests that access to employee self-service at home using portals, e-mail systems or instant messaging can provide a realistic alternative for these employee populations.



For example, Sandra, who is seeking a loan from her retirement account could send an e-mail message from a home account to an HR e-mail address. An automatic e-mail response system could then either route Sandra's request to a service center employee or draft an automatic response to Sandra's inquiry. In this response, Sandra could be provided with a list of FAQs about loan procedures, the appropriate forms she would need to complete, or a link to guide her to the appropriate section of a Web site where she could complete her processing online.

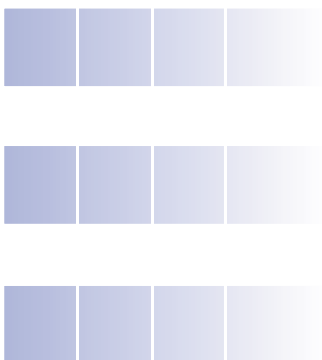
Making employee self-service work

Making an investment in employee self-service goes beyond providing access to information. Organizations that have been successful in getting employees to use and obtain value from these systems have learned a number of important lessons along the way. These lessons generally fall into three primary groups. The first set focuses primarily on the design of both the front-end system and the back-end processes to help ensure that employees are drawn to, and can easily use, the self-service system. The second group addresses the unique change management considerations of two important constituencies – the end users and the support professionals who previously provided them with information. Finally, the third group provides insights into the rollout, security and accuracy challenges that must be appropriately managed to make an employee self-service implementation successful.

Systems and process design

To improve the successful use of employee self-service systems, organizations should apply the following lessons learned in the systems and process design areas.

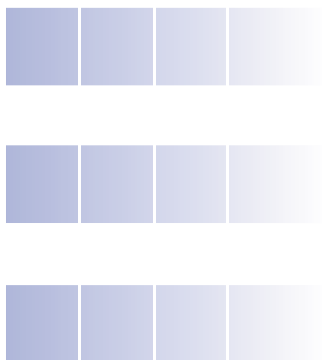
Standardize processes to streamline work and reduce confusion. Organizations that are looking for workers to take responsibility for managing their own information must be prepared to examine their back-end processes to make sure they are not simply Web-enabling an existing jumble of disconnected systems and work flows. While it is difficult enough for a professional who is well-versed in a variety of systems to wade through poorly designed processes, expecting an employee to do the same is unrealistic and can quickly inhibit systems usage. For example, expecting users to be willing to sift through five different versions of an employee status change form or enter the same data in multiple locations will more than likely send users back to their original information channels and undermine the investment in the system. While there may be legitimate differences in processes depending on the line of business, geography, bargaining unit and the like, organizations need to take a hard look at their supporting processes before they decide to shift the responsibility for these activities to end users.



Get employees involved early in the employee self-service system design. The bane of many IT projects is a focus on cramming as many functions and features into the system as possible, without paying attention to the information requirements of the end users. Employee self-service is no exception. In some situations, simplicity in the type and amount of information that needs to be provided may be of significant value to employees, particularly if an employee is using a mobile device or has limited available bandwidth. Therefore, organizations need to pay particular attention to what information users need from a self-service system, the channels they will be using to obtain the information and how they will use the information in their day-to-day work environment. For example, providing employees with a list of internal job openings may be valuable, but the inability to segment this list into geographies, job classifications, hiring dates and the like may bring up an overwhelming list of ill-suited positions and prevent individuals from effectively using the system. Involving a range of employees from different target audiences in the design of both the information architecture and user experience can reduce the probability of overloading a user and discouraging return visits.

Create an “anchor tenant.” One of the keys to successfully rolling out an employee self-service system is to provide an application that will quickly attract use by a wide range of employees. By drawing people to the site on a repeated basis, these “anchor tenants” attract large numbers of individuals to the site. In turn, this gives employees the opportunity to become comfortable with using self-service tools and demonstrate how these tools can provide them with specific value. Eventually, these initial applications make it easier for the organization to roll out subsequent self-service systems and increase the probability for their adoption.

For example, American Airlines recognized the importance of travel privileges for employees and families when it wanted to draw individuals to its new Jetnet employee portal. In 2002, it gave employees the opportunity to make their own travel reservations for themselves and their families. Six months later, having given employees a level of experience and comfort in using employee self-service tools through Jetnet, American continued to promote self-service use by requiring domestic employees to complete their open benefits enrollment online. Despite the change from a manual to an online environment, enrollment rates remained steady. Based on the successes of these initial rollouts, American has continued to add additional functionality to its Jetnet site, include daily corporate news updates, pilot and flight attendant schedule bidding, career planning, health insurance benefits, life insurance and access to 401K accounts.¹¹



Aggregate patterns of behavioral change

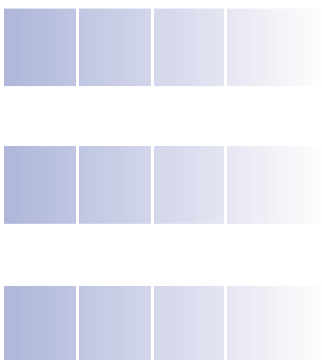
To improve the successful use of employee self-service systems, organizations should apply the following lessons learned in the aggregate patterns of behavioral change area.

Invest in marketing to influence the behavior of end users. At its core, employee self-service is about asking individuals to work in a different manner from which they are accustomed. From an end-user perspective, employees may be quite hesitant to use a self-service tool for a variety of reasons. For one, employees may view a self-service system as simply another task that has been added to their list. Given the fact that many employees have seen their workloads increase significantly over the last several years, employee self-service systems may be viewed as just another example of management passing on yet another task. Also, employees may be comfortable using their existing channels, such as their managers or local HR representatives, for obtaining necessary information and see little need to change what already works for them.

Marketing employee self-service systems is a necessary step in facilitating large-scale employee adoption and should take a number of different forms. Print media, in the form of posters and bulletin boards, can provide initial awareness and visibility. Standard corporate communication vehicles, such as newsletters and the company intranet, can provide implementation details, provide testimonials from satisfied users and set expectations for future system enhancements.

However, communicating key messages should not be limited to mass communication vehicles. Perhaps the most important channel for increasing adoption is the key influence of leaders within the organization. Recent research has highlighted the importance of individuals who have a disproportionate influence on others within an organization.¹² Identifying the key influencer(s) within targeted employee populations and working with them to spread the word about the system's benefits can play a critical role in how well other employees in the organization adopt the system.

Address the changing responsibilities of the support professional. While end users may initially be resistant to using employee self-service systems, the HR professionals who previously supported these employees may be resistant to the introduction of the new technology. The introduction of an employee self-service system may appear to be threatening, as it changes the nature of the value proposition that they offer to their internal customers. While an employee self-service system may relieve the HR (or IT or Procurement) professional of the burden of



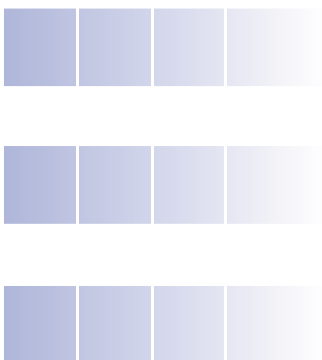
answering routine, repetitive questions, it also reduces the personal interactions they had with employees. Furthermore, the professional may no longer be perceived as the “person with the answers,” potentially diminishing their stature in the eyes of other employees. In addition, the rollout of an employee self-service system may be perceived as part of a larger headcount reduction effort, especially if it is coupled with other changes, such as the migration to a shared service environment.

Clearly, a comprehensive change management program needs to occur to help professionals transition from their current way of working to an environment that is supported by employee self-service. This includes examining and redefining the activities, job descriptions, skills, performance measurements and recognition systems associated with individuals jobs, communicating with employees about the changes in their roles and responsibilities, and providing them with additional management support during the first several months of implementation. As professionals move away from a tactical, responsive role to more of a strategic, advisory role, individuals need to be counseled on the new tasks they need to complete and the new capabilities they need to develop.

Implementation and maintenance

To improve the successful use of employee self-service systems, organizations should apply the following lessons learned in the implementation and maintenance areas.

Provide users with unique identifiers to help ensure security and privacy. One of the critical steps in launching an employee self-service system is to help ensure that all participants have a unique identifier that can be used for access and verification. Given the importance of both data accuracy and privacy, individuals must have confidence that only they have the ability to obtain and modify critical information about themselves. While this sounds fairly straightforward, companies often face two challenges. On one hand, many companies may not be equipped to maintain a process for delivering and maintaining access privileges, particularly for individuals who do not normally use traditional corporate network systems. For example, sales representatives who may share laptops in the field, or production workers who have no standard PC access, need to receive an ID and maintain a password or other form of verification. Also, employee self-service access needs to be integrated into the wider IT architecture (e.g., single sign-on) to avoid the problems associated with multiple logons and passwords. Tools such as biometrics and portable storage devices can also be used to help ensure individual privacy.

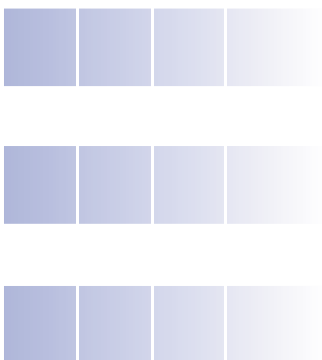


Stagger rollout to different audience groups. Spacing out the implementation of self-service technologies to different employee populations provides a number of important benefits. First, when employees are initially becoming familiar with these new packages and features, they often have questions which they refer to their HR representatives, the HR call center or even the IT help desk. Introducing new technology to a large group of employees can quickly swamp even the most prepared group of support resources. If these help desks are overloaded, then employees with questions are more likely simply to ignore the self-service resources and revert back to their original information sources. Second, staggering the rollout allows the company to target its marketing to a focused set of employees and allow the “buzz” to trickle out to other groups – creating a demand for services before the full-scale rollout. Third, deploying a system geared to a smaller audience can give the organization time to correct any last-minute problems with the system before it is exposed to the full brunt of the organization’s scrutiny.

Maintain the knowledge base to help ensure accurate information. Nothing defeats the value of a self-service application faster than having it provide out-of-date or incorrect information. At the heart of any self-service application is timely and accurate data and information that must be maintained by the organization. Changes to compensation plans, employee scorecards, summary plan descriptions and the like all need to be updated regularly in the knowledge base that supports the self-service application. Without regular maintenance, it is easy for employees to lose confidence in the systems they are accessing, and they will resort to other channels to obtain their information.

Conclusion

Employee self-service can be a winning proposition for both employers and employees. It can enable individuals to take control of their work-related information, at the time and place when it most suits their needs. At the same time, organizations can achieve both monetary gains and improved employee satisfaction through automating routine inquiries, focusing limited resources on higher value-added activities and reducing the amount of paper handled throughout the organization. However, we have seen the successful adoption of these systems be heavily dependent upon a detailed understanding of different segments of the employee population. Recognizing that many workers do not use a traditional desktop as part of their work environment, self-service systems need to be flexible enough to encompass a wide variety of access channels and delivery modes.



Furthermore, different employee groups will require unique education and marketing efforts to help ensure widespread usage and prevent workers from relying on previous information sources. By gearing employee self-service to the employee's information needs and usage requirements, organizations can improve their odds of successful implementation and create value for all stakeholders.

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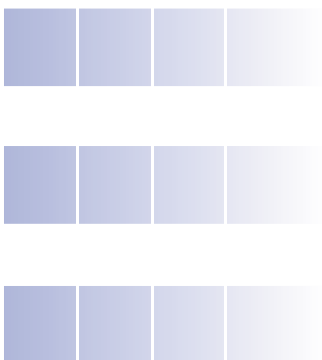
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The authors would like to thank the following people for providing comments and suggestions on this paper: Carl Hoffmann, Bruce Johnson, John Kells, Bill Matson, Judith Quillard and Elizabeth Robinson.

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