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HR Help Desk Best Practices

KEY HR CASE MANAGEMENT FEATURES THAT ARE ESSENTIAL FOR HR DEPARTMENTS OF ANY SIZE

Introduction

Who needs an HR help desk solution?

Answer: Any organization with an HR team. Regardless of size, if you have an HR department that interacts with company employees on a daily basis, then it is critical to maintain a detailed record of every worker's case.

In today's litigious world, many employees will take advantage of the smallest issue if it means a potentially large payday. Just read the news today. Without comprehensive backup to prove HR's formal and detailed efforts to resolve employee issues, crafty lawyers will push for, and win, lucrative settlements from employers. Certainly the larger the organization the larger the risk; but a large financial settlement can easily wipe out a small company.

Additionally, without HIPAA-compliant systems in place, exposure to violations can trigger large government fines. The best HR help desk systems are HIPAA, PII and PHI compliant, in contrast to traditional non-compliant email (the most common "help desk app" in companies today).

Designed for HR vs. retrofitted IT Help Desk

There are 2 classes of HR help desk solutions – HR specific systems built from the ground up for HR, and IT/CRM based systems that are retrofitted with HR functionality. When analyzing potential new systems, look carefully for the level of security, privacy, and confidentiality in both the application functionality and the deployment environment.

Can confidential cases be hidden from unauthorized eyes? Can the employee request confidentiality when submitting a new case? Is the database encrypted at rest? Is your data intermingled with other company data in a shared server environment (SaaS)?

These and other related questions must be answered to ensure your new system meets and exceeds corporate requirements.

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Integration with Current and Future Systems

HRIS System integration

HR help desk systems need information from your HRIS systems in order to run properly. At a minimum these systems must have the employee name and business ID#, and likely other data such as home department, business email, and more. Make sure the system integration can be configured to be real-time or at least near real-time. Otherwise HR may be working with out-of-date information.

Common integration methods are through a database view, web service, or placing a .csv file on an SFTP server. Direct connection to the HRIS database is generally not recommended.

Some HR help desk systems provide the ability to modify HRIS records within the help desk system, though this feature should be reviewed and considered carefully to ensure that there is a single version of "the truth". In practice, the great majority of HR help desk deployments disable this feature, or don't offer it at all.

IVR/CTI integration

Many larger organizations run HR call centers with banks of agents organized to take auto-routed calls based on case category, employee location, or other criteria. Most call centers deploy computer telephony integration systems (CTI) to manage the call routing function.

The better help desk solutions can plug into the CTI systems to open the help desk system with the employee's record on screen, ready to confirm his/her identity and manage the case.

Taking it a step further, using interactive voice response (IVR) and the phone's touchtone feature, incoming employee calls can be routed to specialists based on the employee's menu selections. Products such as LBi HR Help Desk can support both IVR and CTI integration. Common system brands are Avaya, Cisco, and Genesys.

Make sure the ***system integration*** *can be configured to be* ***real-time.***

Linking to social media services

Wouldn't HR love to know what their employees are saying or doing online? Maybe, but can HR legally use this information when addressing employee issues? Again, maybe. Laws regarding use of data gathered from social media sites varies from region to region, so be certain of your local laws before considering use of information from these sources. LBi HR Help Desk provides links to employee public pages on Facebook, Twitter, LinkedIn, and Google+. However, the feature can be disabled at the client's request.

Integrating Chat

Like many software features, there are both positives and negatives to traditional chat. Chat provides virtually instant communication with HR. It provides a written detail of the conversation. And most HR help desk chat services allow a new case to be initiated with just a few keystrokes within the chat window.

However, chat requires significant HR FTE resources to be readily available in order for it to be a viable service. Chat may discourage use of employee self-service features, like searchable FAQs and wikis. "Why search for my answer when I can instantly talk to HR?" And in LBi's experience, many agents tend to close chat windows without generating a new case, thereby losing valuable data for reporting and analytics. If you do use chat, make sure it is not the first line of defense.

LBi has two solutions for the chat request:

1. Traditional Chat – Live chat that allows for communication with visitors to a site. The interface of a live chat application is similar to an instant messenger window.
2. Employee Interactions – LBi's Employee Interactions are sort of a chat/email hybrid, which offers the best of both services. Employees first create a new case within their web portal. From within the portal they can initiate a chat session. The HR case owner receives a notification that an interaction was initiated. HR responds and the employee is notified. Therefore the interaction is real-time AND embedded within the case.

Additionally, HR can further the conversation with other HR users, behind the scenes. The employee will only see his/her conversation with HR, while HR will view the entire chain. Traditional chat is strictly 2-way, where LBi Employee Interactions are multi-way. And due to the service's design, interaction participants can choose to respond now or later, like email, so there is no strain on FTE resources.

Core Features

Purging older data

LBi recommends that older data should not be purged. Users tell us that a complete history of employee cases at their fingertips is highly beneficial. Since record sizes are very small, there is rarely an issue with search speed or database storage capacity. Some users do limit the employee's view of their past cases to 3-4 years (in the employee web portal).

Analytics and reporting

A picture is worth a thousand words. The most comprehensive reporting engines provide clearly organized data text (when you need the thousand words) and graphical summaries. Key performance indicators (KPI) should be a standard offering as well as traditional reporting. Non-technical user data extraction capability (for use in Excel and other systems) should be standard as well.

Users should be provided with the capability to create and save custom reports under user-defined names (i.e., "Bob's weekly overdue report"). Saved reports should be able to be scheduled to run at user-defined days and times, and sent to user-defined distribution lists.

Language translation dos and don'ts

Be wary of language translation engines that may improperly translate regional slang or colloquial expressions. Incorrect translation can lead to serious misinterpretation of employee issues. To be safe, some HR help desk systems will only translate static text, check boxes, and drop-down lists, requiring HR to validate each employee's (freeform) problem text to ensure they fully understand the request or issue.

Employee self-service

A must-have for the greatest system effectiveness and employee satisfaction. Comprehensive, searchable FAQs and wiki-style knowledge bases can reduce unnecessary calls into HR by 50% or more. LBi HR Help Desk includes both, and can integrate with existing knowledge bases, such as custom SharePoint sites. The best systems push relevant KB selections to the employee as he/she is creating a new case.

Providing limited access to 1099s, retirees, and other "non-employees"

Many companies will provide limited access to certain groups, for instance, providing access to retirees who may have 401k questions, or offering COBRA support to terminated employees.

These workers are typically not included in the standard HRIS employee masterfile download, so the system must either accept feeds from other sources, or include a new employee creation utility.

Auto case generation from regular incoming email

Probably the #1 requested feature. Employees can send a regular text email into a mailbox monitored by the help desk system. Based on the employee's registered email address and the email body text, the system can create a new case, categorized based on parsing the message text, and auto-routed to the appropriate HR user or group.

For the system to work properly, employees must use key words in the subject line and/or message text, such as "payroll problem" or "manager dispute". Text such as "I have a problem. Please talk to my boss" just won't cut it. The key to email success is creating simple but descriptive case categories and subcategories that employees understand.

Employee self-service** is a must-have for the greatest system **effectiveness.

System Deployment

Hosting vs. on premises deployment vs. cloud

This is generally a choice made by your IT department. But HR needs to determine if IT may have access to sensitive employee data. Some LBi clients prefer to have us host, specifically to minimize non-HR access to data.

Other determination factors are the ability to support the system 24/7, cost of hosting vs. in-house, disaster recovery capability, and more. Most LBi clients are hosted through LBi.

Cloud hosting can be either public or private:

- Public Cloud – typically just called "Cloud computing" – provides computing resources that are not tied to any specific location. Cloud computing basically consists of virtual computers/servers, data storage capacity, communications and messaging capacity, network capacity, and development environments.
- Private Cloud – is the restriction of cloud computing services to a limited number of people (typically within one company or organization).

Some systems are SaaS only, so you may not have an option. Having choices is always preferable.

Having ***choices*** *is always* ***preferable***

Single tenant vs. multi-tenant

SaaS is by definition multi-tenant - sharing at least the application server with other clients, and in some cases the sharing the database. In a single-tenant deployment nothing is shared. Examples of single-tenant are in-house deployment and dedicated server hosting. If you are offered a choice, consider the potential risks and your corporate risk policies. Both deployments can be adequately secure, but one is clearly more secure than the other.

New Features

- Responsive Design - A web development technique that creates a site or system that reacts to the size of a user's screen. This allows for a single secure website that works for all platforms instead of individual sites for each type of screen.

- Security - The following security features should be included in a help desk solution:
  - ◊ Developed with OWASP Secure Coding Practices
  - ◊ Two-factor authentication
  - ◊ Single sign-on integration
  - ◊ Confidential case settings
  - ◊ Advanced password management capability

- Outcome Processing - Uses AI features such as Natural Language Processing and Deep Learning to answer an employee's question.

Financial Considerations

Licensing

SaaS licensing is essentially a rental program. You pay an upfront setup fee plus monthly use fees for a set term. At the end of the term the services are discontinued unless you renew. Often, the monthly fee is based on the number of employees on the system – for instance $1 per employee per month, or similar price. It is important not to be tricked by this method of “reducing to the ridiculous”. The 3-year cost for a 5,000 employee company using the $1 example would exceed $180,000 plus initial setup costs.

Perpetual licensing is the traditional method for acquiring new software. You are buying a perpetual (or ongoing) unlimited use of the software. Essentially you “own” the system. Generally the client needs to add annual support costs that are included in the SaaS model, usually about 20-25% of the initial license. As with SaaS, you need to add setup costs as well.

Usually the deployment selection dictates the license model, but if given a choice (or comparing vendor pricing), do the hard math. Often the seemingly lowest cost option can be the most expensive over time. To perform a fair total cost of ownership (TCO) analysis, be sure you include all upfront and ongoing costs over at least a 3-year period. In the end your decision should be made based on which system best meets your business needs, but at what cost? Sometimes good enough is good enough.

Determining the ROI

Basic Cost per Call Calculation:
HR Staff Member’s Hourly Wage ÷ Calls per Hour

Not all systems require a formal return on investment (ROI) analysis in order to justify the purchase. But in case you are curious or corporate finance requests one, consider hard dollar savings (eliminating FTEs) as well as soft dollar savings (increased productivity). Detail improved employee satisfaction, fewer complaints, etc., as benefits. Show no need to add new HR staff even as company employment increases. Point to greater adherence to corporate policies. Highlight that harassment case that was settled in the company’s favor. ROI is not simply an analysis of hard dollar savings. The benefits of HR help desk are obvious.

Final Thoughts

Vendor Selection

Just as important as selecting the best system for your organization is vendor selection. Because in most cases (but not all) there may only be one vendor authorized to license and support any particular product, you will need to focus equal attention on the supporting vendor’s experience and qualifications. Below are important questions to ask:

1. How long is the vendor in business?
2. Are they willing to share their financial statements?
3. How experienced are they in your industry?
4. Can they share relevant references?
5. Are their contract agreement terms negotiable?
6. Do they provide performance guarantees?
7. Will they agree to accept performance based progress payments?
8. Does the relationship during the selection process “feel right” for the long term?

There are obviously many factors to consider when selecting a new HR help desk solution. Hopefully the advice we provided in this whitepaper will help you avoid costly mistakes and guide you to the best choice for your organization.

The ***benefits*** *of HR help desk are* ***obvious.***

About LBi Software

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

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