Nonprofit HR

WEBINAR TRANSCRIPT

# First Things First: What to Do Before You Consider New HR Technology

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# First Things First: What to Do Before You Consider New HR Technology

Your organization's investment in an HCM (Human Capital Management) system will streamline your talent management processes in support of staff engagement, development and management. Before you go HCM system shopping, join us as we share our expertise from success stories and lessons learned. We'll discuss guidance in consideration of talent management process development, change management, determining internal capacity to manage the system and much more!

**You will leave this webinar with a deeper understanding of:**

- Why it is necessary to conduct a strengths, weaknesses, opportunities and threats (S.W.O.T.) analysis before beginning.
- How to think through and identify the ways that change will impact people, processes and policies.
- What we've learned from implementing HR technology solutions in various mission-driven environments.

## CONVERSATION HOST

**Lisa McKeown**
Managing Director, Total Rewards

**Eric Salyers**
Former Senior Consultant, Total Rewards

**Stuart Wales, MS, SHRM-CP, PHR, CCP**
Senior Consultant, Total Rewards*

**formerly Consultant, Total Rewards*

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**Atokatha Ashmond Brew:** Hello, everyone, and welcome. Thank you for joining us this afternoon for a Nonprofit HR's Virtual Learning Education Event. Today's session is titled, First Things First: What to Do Before You Consider New HR Technology. My name is Atokatha Ashmond Brew and I'm the Managing Director of Marketing & Strategic Communication for Nonprofit HR. I will be supporting our presenters today during this session. Before we get started, I would like to go over a few items so you know how to participate in today's event.

You have joined the presentation listening using your computer's speaker system by default. If you would prefer to join over the telephone, just select telephone in the audio pane on the GoToWebinar control panel, and the dial-in information will be displayed. You will have the opportunity to submit text questions to today's presenters by typing your questions into the questions pane of the control panel. You may also send in your questions at any time during the presentation. We will collect these and address them during the Q&A session at the end of today's presentation. Today's event is being recorded, and you will receive a follow-up email within the next few days with a link to view the recording.

Just a brief note about Nonprofit HR. Since 2000, Nonprofit HR remains the country's leading and oldest firm focused exclusively on the talent management needs of the social sector, including nonprofits, associations, social enterprises and other mission-driven organizations. We focus our consulting efforts on the following practice areas: Strategy & Advisory, HR Outsourcing, Total Rewards, Diversity, Equity & Inclusion and Search. We were founded with one goal in mind: to strengthen the social impact sector talent management capacity by strengthening its people.

Today's panelists include Lisa McKeown, Managing Director for Total Rewards, Stuart Wales, Consultant for Total Rewards, and Eric Salyers, Senior Consultant for Total Rewards at Nonprofit HR.

Now, a little about Lisa McKeown. Lisa offers clients more than 25 years of experience in global benefits, compensation and HRIS with unique expertise in global compensation strategy, program design and operations. Known to bring a strong service orientation to every project she touches, Lisa is a critical thinker who thoughtfully develops programs that are differentiating for clients and their employees alike. Lisa's toolbox is well equipped, bringing clients stellar services on program design, systems implementation, vendor selection and management, HR policy development, as well as written and verbal communication and staff management.

About Stuart Wales: Stuart is an HR technology advocate working with clients to leverage solutions that align not only their current needs, but also their strategic needs for the future. Focusing on improved employee experiences, Stuart works with clients to streamline and adapt existing processes and HR programs from a technology lens to transform HR into a strategic partner with the organization and improve mission outcomes.

And a little about Eric Salyers. As a Senior Consultant for Nonprofit HR's Total Rewards practice area, Eric Salyers provides advanced subject matter expertise, advice, insight and strategic-level guidance to our clients for the full suite of employee benefits plans. Eric is a highly skilled thought partner in auditing benefits plans as well to ensure compliance.

Again, you will have an opportunity to ask questions throughout the webinar and during today's Q&A session at the end of the webinar.

And now, Lisa McKeown, I will pass this over to you ... to offer some opening remarks.

**Lisa McKeown:** Thank you, Atokatha. It's good to be with you all today. Really, our goal today is to share our guidance and our expertise, and we really hope we'll assist you in your organization, should you be considering a new HR technology solution or perhaps a suite of solutions.

Many organizations jump right into just sending out an RFP (request for proposal), but we do think that it's worth the time and would like you to consider that before you do that, you carve out the time to really assess your organization's readiness for new HR technology solutions. And, we want to talk about it from three different lenses — from a people, a process and a policy perspective, which really will help to guide your organization to ensure that you're selecting a solution that's right for your organization, as opposed to selecting a solution that you then have to follow.

This afternoon, we will share with you our guidance for completing an HR Technology Readiness Assessment. We'll talk about our success stories and our lessons learned in the many projects that we've led for Nonprofit HR clients. And at the end, we absolutely look forward to hearing any questions you may have for us.

Atokatha?

**Atokatha Ashmond Brew:** Thank you, Lisa.

I'd like to start the conversation off with a question that is for you, Stuart. Why is it important for an organization to conduct an HR readiness assessment?

**Stuart Wales:** Great. Thank you, Atokatha.

Really, it's the beginnings of starting to build a business case for why new technology is important for your organization, to help to really define that need and the plan to address the challenges that come along with the change associated with implementing new technology ... As part of what we've seen over the last two years through the pandemic, there's been a lot of need just to go into an online environment, or virtual environment.

All of that has kind of left HR behind in the dust because there are greater organizational needs. But even then, there are things within the HR technology landscape that need to be considered as part of that. But we want to make sure that we're not just addressing a functionality perspective, but it's from a holistic organization perspective and making sure that the organization is ready — and not just necessarily forced to be ready — to adopt new technology.

But this assessment really helps to establish a baseline, just even from which you can evaluate a new solution if you get to that point. Identify what's within an organization's control, what isn't, how it influences the current, as well affects the future state. For product-specific factors, [we ask] questions ... that are really ... [aiming to understand] the context and how the current HR technology landscape came to be. So, why are the current solution, or solutions, selected? Did the solution, or are the solutions, achieving the business objectives that we thought they would?

And even going beyond that, we have some clients that don't necessarily understand all of what they have purchased as part of their suite of services. Or, if they have purchased something ... they didn't even turn ... on what they have configured or configured with best practices.

And just from ... making the finance folks happy, what's the current spend on that? To make sure that, when you do go to market, you can understand what you can expect from that return on investment, should you go to a new vendor.

As far as organization-specific factors [go], we want to stress that technology doesn't live in a vacuum and that the tool is only as good as what governs its usage. So Lisa mentioned the three Ps, as I like to call them: the people, the processes [and] the policies. Not every solution is necessarily a technology solution, and we've seen things with our clients that have led to great adoption for technology. But sometimes when we come in, particularly for some of our reimplementation projects, we see that the challenges aren't necessarily with the functionality of a specific product that has been used or ... been implemented, but the environment in which it's operating. So, we'll talk a little bit more about that.

But the assessment itself ... again, provides a holistic opportunity to evaluate the entire environment [in which] ... the technology is operating, and then making sure that the organization is ready to address those challenges to adapt to any new technology. Again, if you all get to that point.

**Lisa McKeown:** Atokatha, you're muted.

**Atokatha Ashmond Brew:** Right, sorry. Anything to add to that, Lisa or Eric?

**Eric Salyers:** I like that Stuart asked that question, why was the current solution selected? I find that you can really get a lot of good information by asking, why did you choose this product? What did you think it was solving? It really helps to get to the root of it sometimes, [it] takes them out of ... a different mindset, to be able to approach it differently. So, I really appreciate that you brought that to light.

**Atokatha Ashmond Brew:** Yeah. And there was a point that you also made, Stuart, regarding making sure that the solution is achieving business objectives, which can be broad and quite diverse for organizations. Can you offer any insight on how they know whether or not this objective they have actually has a tech component?

**Stuart Wales:** Yeah ... There's a lot of technology out there for a lot of solutions ... and sometimes organizations lead with the solution, or rather, lead with the tech ... lead with the technology solution as opposed to thinking through what the business objective actually is. But it does need to be in alignment ... making sure that whatever you choose is solving whatever problem you think it's going to solve.

... Not every solution is a technology solution. We'll get into some examples of what we've uncovered when we work with clients, around what those challenges are ... it really depends on the scenario on what you're trying to achieve. And even over time, business objectives change. So, what could have been a technology solution in the past may no longer be relevant or necessary moving forward in the future.

**Atokatha Ashmond Brew:** Great. Thank you so much. And we do have a follow-up question from one of our participants, and they're asking — and I know we're going to talk about this a little later — for just a little bit of insight on the types of HR technology we're talking about.

**Stuart Wales:** So, this could really be just about anything. There are certainly vendors that provide a comprehensive suite of services that are ... an all-in-one solution.

It could be any sort of single-point solution, whether it's an applicant tracking, performance management, even employee recognition platform. So, it really covers the gamut. We're not necessarily trying to point out any one particular vendor or set up ... because this could be something, as an example, that you do have, or ... you currently might be with a vendor that provides a comprehensive suite of services. But you find — [for] just as an example — that their applicant tracking system ... no longer [meets] your needs. So you want to go through asking all these different questions to [understand] ... what is really the root of why we think we need a new solution before we can go back to market to find something else?

Because it could just be something that you don't know about an existing product that you're using that you might need to flip on. It could be a product update that might address whatever functionality gap you believe to exist or want to improve.

So again, we want to make sure that you're getting the best out of your current environment and what you've currently been spending on ... [It] is really to just minimize — essentially, change overall because these types of projects can be disruptions to the organization.

There needs to be a focus on what is, from an end-user standpoint ... that employee experience? And, if people like the tools that they have, they're not necessarily inclined to move away from them. Obviously, the more they don't like them, [the] easier [it is] to [move] in the opposite direction. But we want to make sure that we're collecting as much data behind the decision to support the business case to move to a new solution if that is indeed the best option.

**Atokatha Ashmond Brew:** Thank you so much, Stuart, and just keeping along with the concept of people and process and policies. Lisa, this question is for you.

What do organization's need for successful technology adoption from the people perspective?

**Lisa McKeown:** Yeah. This is a really great question, and I think it's really critical that we think about the different audiences and the different ... [human needs] around the technology. I think there's going to be a lot of cultural changes that could occur based upon a new system that you might bring in. When an organization brings on a new technology to support across different talent management work streams, you really do need to think about: Who are the end users?

So, for example, if there are folks within the organization that will be supporting certain talent management initiatives, [understand] who they are, how the system will need to be developed and how they will need to be supported in their work. [Understand] if part of their role will be responsible for managing, within your area, some of those talent management initiatives or work streams, such as performance management or applicant tracking, learning and development, benefits. So all of those will require end users to be knowledgeable not only about the content of their work, but also how the technology supports them. So, I think it's important to think about who [the end users] will be and who ... those end users [will] be supporting in this work.

I think another thing to know ... is one of the ways that external folks will take a look at your system: through ... your applicant tracking. So, that provides an opportunity to really set your content, set the information that you want to share, really, set how candidates will get their first view into your organization.

So, [think] about what messaging, what type of content you want to share with those [who] will likely be engaging somehow through your applicant tracking system. And then, again, how those folks [within your organization] have, along the spectrum of that process, the different touch points employees will have.

If you're thinking about it from [an] applicant tracking [perspective], you’re thinking about it for new hires. Oftentimes, one of the solutions is onboarding. So, if you think about new hires, this could be if they're starting that new hire process; before they even officially join the organization, getting some paperwork, understanding the benefits, or starting their first avenue into the organization through your onboarding process. That, again, is: How do you want new hires to view the organization? How do you want the experience to feel for each of them? And what information do you want to share?

And so, you want to rethink ... if you're going to be developing a process from a people perspective [and] getting a new system, how will the system connect with these various folks across the different talent management touch points?

Another area to really think about when it comes to considering the human part of this — the people part of it — is, you really want to make sure that your staff understand the changes that are about to come.

So, if you are considering a new technology solution, or several solutions, you really want to make sure that you're reaching out to staff, communicating with them about the project through different channels in which they typically communicate.

How will you assure them that they will get the support they need in learning the system, that they'll know when to expect things to go online, if you're staggering, which modules you'll start first? Organizations might start, obviously, with payroll first and benefits. So, employees may have their first touch point in enrolling in benefits, so really making sure that employees understand the plan for the project, how things will roll out, what their role will be, whether they're on the project team, or they're an end user, or they're an employee that might experience having to sign up for the benefits for the first time or fill out a performance review. So really being clear that they understand what their role is and what the expectations are around that.

You want to make sure that from a technology-capability perspective, that not all roles require their regular use of technology. Not everybody uses a laptop for their job. A lot of the nonprofits have clients that are in the field connecting directly, directly with support, support that they're giving in the community. So they might be more on a smartphone. They might be more on a tablet or an iPad. So, you really want to ensure that not only do they understand what their expectation will be around when things might get rolled out, but that they feel supported if they don't understand the technology or they're not tech savvy necessarily. So, you want to be able to make sure that you can reach out to your staff on multiple platforms, and that you're ensuring that they're—that the vendor that you select has ways to access the tool through multiple platforms, whether it be a smartphone or a tablet or their laptop, and really ensure that they're going to be able to provide training to staff around that as well.

One of the other considerations is, what's the internal capacity of the team that has to support the day-to-day administration and oversight of the technology? Who on the team can partner with the vendor? Not only through once the system is in place, but through implementation, through configuration, through selection, through rollout and training. There really should be a team of people or, if you're a really small organization, at least one person that the vendor or if your partner with a consultant to do the work, that can really can be dedicated to supporting both the vendor or the consultant in assisting an implementation.

Really, you want to make sure that you understand the amount of time, and vendors can usually help you figure this out, the amount of time it's actually going to take to maintain the system, to keep the tables up to date, to ensure system updates are happening on a regular basis, the amount of time it might be to support the organization in rolling out different processes.

Performance management happens every year, so someone's going to have to start that process, maintain that process, ensure that there aren't any hiccups, and somebody can respond to that [and] get reporting done.

So, you want to think about, do you need a full-time person? Is there someone on staff? Is it part-time? Can somebody do this as part of their role? And, what are the different departments? And other staff from those other groups — such as payroll ... communications ... perhaps, [will they] need to have some sort of ownership over the technology or the system? And, who's going to be able to make decisions about when modules get rolled out or when processes begin or processes need to be changed?

So, there's so many different aspects to the people side of this. I really want to turn it over to Stuart. He's got some great success stories to share and ... some lessons learned that I think will be really helpful to illustrate some of this.

**Stuart Wales:** Great. Thanks, Lisa.

So, yeah, we have ... clients across the spectrum here, and just talking through projects that we've worked on that have gone really well. The first one that comes to mind with respect to technology anyway, technology was a component of a larger HR transformation project with this particular client. And as part of that, because there's a lot of change going on — not just the technology piece. But that was, again, part of what was addressed. We made sure that there was a multi-layered communication plan to that. Everything that we were trying to do as part of this transformation project was conveyed at the right time by the right person in the right manner.

So, [it was about] making sure that there were multiple touch points, not just via email, but through staff meetings ... one-on-ones with supervisors, making sure that leaders across the organization were all in line and conveying the same messaging, even if you have a slightly different perspective. Tailoring it ... to each audience and what's really ... in it for them, making sure that those different segments — whether it's frontline staff, managers, field staff, whatever it was, to make sure that their individual needs were being addressed.

Going back to one of the points that Lisa mentioned around technology capability and readiness for staff, with that particular organization did have field staff. And they're not necessarily sitting in front of computers, so we needed to make sure to address ... how we expect things to go and how to engage with this new technology. Whether that was through smartphones, putting in new kiosks for clocking in and clocking out — whatever the case may be. But again, it was very much [about] making sure that there was targeted messaging and targeted training, even, for the different audiences, to make sure that they understood what their role was in the process in using the new technology.

On that end of training, another client that we've worked with, in addressing people, or the issue, took on addressing different learning methods. Certainly, a lot of time can be spent doing a live training. But for some of the things you're doing within the new technology solution, you might be only doing it once a year or a couple of times a year. It's not necessarily timekeeping, where you're doing that every week, right? So, we create training videos to provide just-in-time training for down the road [where], as needed, things can be referred back to or correcting documentation in a training guide in addition to any live or recorded training that will help employees down the road. And, again, it's really [about] just trying to meet employees where they are in the best manner in which they are learning that new requirement.

One other area in which to ... consider people as part of — and this isn't necessarily part of the HR readiness assessment ... but, in terms of looking to improve adoption rates, consider involving staff as part of the selection process. So, this really helps to address any fears and concerns that staff might have ahead of the implementation. You can really build a pipeline of change champions. That can be ... that they had input into this process and [made] sure that specific groups of employees will find a solution useful in their work ... that can be done as part of the collection process. But that can also be done ahead of time as part of the readiness assessment. You can bring in focus groups to understand: What is the work being done, and what are the pain points that employees might be experiencing within the current environment? You may find that there aren't many pain points ... The client we worked with ... [was] great. But they were really just looking more to get to that next level. So, it wasn't necessarily any lessons learned on that end, but just trying to get to that next step in the evolution of that particular organization.

On the lessons learned side, one client that we worked with, we found that no one on the staff end of things was using self-service. And as we dug into that, we found that the system wasn't really rolled out properly to begin with. There wasn't really enough communication around what the capabilities of the system were, what the expectations of the employees were with using the new system, and furthermore, [there was] no ongoing training plan for staff or communication about how the product should be used on an ongoing basis.

And that presents its own challenges too. We've found organizations in similar boats where they're dissatisfied with the product but that's more because ... they don't necessarily understand how to use it, so then we have to, again, re-roll out the product because there wasn't necessarily anything functionally wrong with it, there [was a ] need to [have] a better understanding of how to [use the product].

Some other clients we've worked with, going back to the internal capacity to support the product that Lisa mentioned, we found that administrators weren't initially trained to use the product in question. And, again, that's their initial implementation, but over time products ... change. So if you're not necessarily keeping up with product updates, that could also affect your current state and how you might feel about your current product that you're using and whether or not you might want to move to something else. So long as you're keeping up to date on what's happening with the product, you'll be able to better use it ... the way that it was built by the particular vendor.

Again, with respect to internal capacity, we found, when we dig in with other clients, that they may not even staff correctly to be able to support the product. And the more sophisticated the product you have or have selected to use ... the more likely you're going to need some internal expertise to really facilitate the internal workings of that product.

The one client that comes to mind [had] some internal support, but it wasn't necessarily at the right level. So really, it's needing to look at that staffing plan that is in place to support it and determining if there's a level of, say, you might not necessarily need HR experience, but you might need programming experience. There might be somebody that needs to live within IT and not necessarily within HR or even finance, on a payroll — that hot potato of payroll that that we like to talk about between different departments.

So, again, it's more of a holistic experience — approach — ... looking at people and not just the functionality of the product itself.

**Atokatha Ashmond Brew:** Great. I took lots of notes here, Lisa and Stuart, on everything that you shared and some of the things that I took away are ensuring that employees are not left behind and that everyone can be advanced at the same time to ensure success. I also took a note, don't go it alone. Thought partner internally, thought partner with your vendors on things that you just may not know or may not think will even come up. It sounds as if you all are saying that the scope is really grand but also very granular as well. And then you mentioned the different layers of user training and making sure that you're moving from staffing trained to administrators.

Are there any other points that you all would like to make regarding people and the HR tech aspects for considering moving toward a new solution?

**Eric Salyers:** I think that Stuart and Lisa did a great job providing a very comprehensive perspective there ... I appreciate that each of them touched on employee communication and, Atokatha, you heard that as well.

I think that's very easy to overlook. Stuart, Lisa and myself, we've all done implementations in real life. We know how big those projects are. And, for our nonprofit clients, we know it's probably unlikely that you're going to have a person sitting in, like, a systems role or an HRIS role. So, you're probably going to be an internal administrator that's wearing multiple hats. You're going to find that the demands [it all] takes, whatever it requires to go through implementation, is big. And it's easy to ... let that communication piece slip. You don't want to just drop this in your employees' laps and not roll that out well because it takes — it's a very slippery [slope] to have ... a cloud of… hang over, like the system's not a good system. Or if they're not understanding and it's not rolled out well, it can really impact that end-user experience and influence the perception of how good of a rollout that was.

**Atokatha Ashmond Brew:** Thank you so much, Eric.

And I think that we have an opportunity now to move on to the next question, which I think is for you, Lisa. It is: How should an organization consider process, or the lack of processes, when considering HR technology?

**Lisa McKeown:** Yeah, thank you, Atokatha. Similar to how you want to look at the people capabilities from all different angles, you also want to take this opportunity — whether you currently have a system or ... are considering purchasing the system — ... to look at everything that you're currently doing within human resources, and look to see where you can be more efficient, where you can be more effective, and look at all of your processes that are across your HR department.

It could be that you are a person of one. You might be a little bit larger and you have more people, you could be ... as Eric had said ... you're wearing more than one hat. So I think, no matter what the scenario, just really preparing yourself, considering what systems you want to evaluate is thinking about all of the work that you currently have that you could really operationalize and ... systematize ...

So, if you think about onboarding, I know in all of my years of experience, onboarding always seems to be something that never really gets quite there. It's always like a "kick the can down the road" sort of a thing, like, it works, but, I think it's also an opportunity where you get a lot of feedback from employees, where their onboarding experience was not really as positive as it could be. There was a lot that they still [didn't] understand ... If you think about ... the lifecycle of an employee in your organization and think about each of those lifecycles,  think about where you currently have manual processes [where] you could be more systematic ...

So, onboarding, for example, is a process. It's an experience. It's [introducing] an employee to your organization. It's where they begin to learn and understand about policies ... procedures and benefits — things like that. So [it's about] using a technology system that's more ... self-service, self-guided, easier to sign off on forms, easy to access. You're making sure that the flow of how they go through onboarding is there. I think if you approach all of your different talent management processes through that lens, it might help you to really think about putting a plan together.

So you can't necessarily tackle onboarding, performance management, applicant tracking —all of it at once — so ... think about each of your processes, such as benefits. There's a lot of opportunity with technology to get away from having to log into multiple websites for various vendors and sign people up for benefits. You can get very sophisticated with most of the technologies that are out there, where employees can be online, select their benefits, walk through a wizard ... to select all their benefits and then the technology will send files out to different vendors.

Now, those are all things you have to set up as part of your technology solution. But think about the amount of errors you'll reduce [and] the amount of time, it really puts ownership on the employee — you're not chasing forms. And it puts ownership where it belongs ... engaging with managers and employees this way and thinking about how you can change all of your different ... employee lifecycle processes to support systematizing and being more efficient. It will let you definitely improve your business outcomes and provide ways to be more compliant and error proof as well.

And I know there's a couple of others that Stuart wanted to mention as well, so I'll turn it over to Stuart to talk about some additional principles that we could follow around considering process as part of our HR technology readiness assessment.

**Stuart Wales:** And to ... encapsulate some of what Lisa said, it's really to identify how change will deliver value to employees or candidates.

We want to make sure that, yes, the processes are meeting our desired business outcomes. [But we must ask]: Are we really executing ... or putting together these processes in the most thoughtful manner that employees and candidates will respond to?

One of the things that often comes to mind for me is recruiting. And organizations that have multiple layers of interviews across the organization ... where you have to meet with everybody from ... the ground up. And that may not necessarily be, certainly not the most efficient process. And the organization may feel it's valuable, but is it valuable to a candidate? Or do they get frustrated having to go through all those different hoops?

Obviously, that's just one example. But there are others, and you want to consider, again, how are these services — coming from a service delivery perspective — being perceived from the outside?

The last thought, really, is just to make sure that you're leading with the business need and not the solution. And then having the solutions dictate how you've done your processes. So, particularly, if you're in your current state and assessing your current state, are you really kind of bound by, or have you been bound by, the solution that was chosen? And [did] that [dictate] how you moved about your business going forward? And, it may have been a happy coincidence that the two worked out, and it's fine, but that's not always necessarily the case. And there may be some system limitations that don't agree with what you ... envision ... or how you want to align your technology with your business objectives.

So, just to identify what the system limitations are around the processes that you want to have. Again, building that business case, and then, being able to identify moving forward what the products are that best meet the business need, as opposed to just picking a solution.

In terms of clients where we've seen the process aspect be really successful in general, these are organizations that have their processes already documented. They're able to evaluate the processes — not just in their heads, but really, deliberately reading line by line — is this really achieving what we thought it would? Is this delivering value? [It's about] taking those critical evaluations, making changes as needed to ... align with the objectives, and then being able to look for a solution — building that business case for a new solution.

One client that comes to mind, they didn't have a particularly strong performance culture. And I knew that they needed something different and [ultimately] wanted to have a solution in place that would support their new process, their new performance feedback methodology. Ultimately, they wanted to have a tool in place that would assure accountability and visibility into the process and make it easier for employees to engage in that process.

Certainly we've seen many organizations still ... in a paper-based world on performance and that can be frustrating for most managers, as well as employees on that end. So technology is certainly there to support it, but we need to understand: ... How do we want the performance feedback program to work, before we can then look at a new solution?

This particular client worked with some of our consultants from our Strategy & Advisory group to develop those new feedback tools, have focus groups with employees to see what would work best for this organization and then that's where we came in, working with our Strategy & Advisory partners. Then say, "OK, these are probably the best products out in the market that will meet the need that we've identified here and how the organization wants to move forward. We may not be able to meet every last thing, but we will certainly get as close as we can." But we took this time to make sure that we really were thoughtful about what that performance feedback program should look like moving into the future, before moving into [a] selection of a system.

Another client that we've gone through, or that we've kind of gone through this process with, again, it really has been an evolving process. They actually had a technology solution in place that hadn't been used before, but they knew that, looking forward, the current program around performance that they had in place could be supported by the existing technology solution. They knew that wasn't where they [wanted] to be, or where they wanted to go ... So that decision was ultimately delayed, until ... they could put some more meat around their performance management system and [get it to where] they want it to look like, before they started engaging in that work. So, that they could, again, build a better business case for why it might be needed, and then, ultimately, to select a better system.

Some lessons learned, particularly coming out of the pandemic, is that ... in general, many organizations don't have their processes documented, and this is not just relevant to technology in general, but more of a business continuity issue. And, certainly it's something that we always recommend organizations to have in place, beyond just being able to identify step-by-step how this process should look. But even going back to the people side of things, if you lose that internal capacity, you're going to need to be able to turn it back over to somebody else to be able to then follow processes that you've already established. So that's why it's always important to make sure that processes are documented as accurately as possible.

[Something] ... I've already ... referred to in lessons learned is ... really identifying any processes that aren't adding any value. We talked about multiple layers of interviews. It could also be multiple layers of approval, as an example. I know sometimes that it could be expensive or it could be [a] hiring approval that needs several signatures [from] the organization before something gets approved. Again, it might not be adding as much value as you think it might be. So really, again, just [take] a critical lens to those processes to, again, identify the things that will add value and not detract from everyone's experience.

In terms of [process]-specific examples of lessons learned, and this is probably a great example for a lot of organizations. Multiple clients that we've worked with, particularly with respect to payroll, tend to all be processed by one person. And there's nothing wrong with that, per se. However, that does bring its own challenges. That there is no one to check for accuracy, there's potential for fraud, and there's no oversight of what's happening there. Certainly, from an auditor perspective, they don't like to see that. They'd like to see more establishment of internal controls, making sure there are some checks and balances, and even just from an accuracy standpoint, making sure that there's another set of eyes on that process to make sure that everything is as accurate as possible.

For other organizations, again — [particularly] around payroll — there might not be a clear distinction and ... payroll [responsibilities] might not live, neither here nor there, between HR and finance, to really help to delineate the responsibilities of everybody that might touch a piece of that process. But it's very clear and, again, [in] respect to internal control, who's touching what, when? Who's pulling the trigger and ultimately, approving all of that?

**Atokatha Ashmond Brew:** All right. Thank you so much, Stuart. Eric, Lisa, do you have anything to add to what Stuart shared?

**Lisa McKeown:** No, I — Eric, were you going to say something? Go ahead.

**Atokatha Ashmond Brew:** You're on mute, Eric.

You're still on mute.

**Lisa McKeown:** He must be having an issue.

**Atokatha Ashmond Brew:** That's OK. While he's working on that, some of the notes that I took from which you had to share, Stuart, were all around onboarding. And this is Lisa and Stuart, the things that you had to share were focused on onboarding, performance management, applicant tracking and pulling it through an entire — pulling that thread through the entire process, and that entire selection process, should you decide that your organization is ready for a new HCM. You also talked a lot about not tackling it all at once, really breaking it up into bite-size chunks. You mentioned, Stuart, to lead with the business need and not the solution, and how important that is. And the one thing that I also heard was you all talking a lot about [was] culture and making sure it's a good fit.

I was wondering if you had anything to also share regarding values and where they come into play, especially with something that Eric was pointing out and reiterating earlier regarding getting buy-in, stakeholder engagement and that communication piece?

**Eric Salyers:** Yeah. My problem is fixed. I don't know what happened, but I couldn’t unmute. All that I was going to say was, I love the potential outcomes in this section, because it really is where you can see a lot of value added back. If you do a solid assessment, make a very purposeful selection and then build out your system really well, the things that you can see in the processes section of this is just amazing.

Lisa talked about some of those. But this is where I really enjoy this work with clients, because, you can see them go from having to sit there and upload a PDF to an email to [send to] somebody to get an I-9 or benefits document, [where] they'll have to take out an email and scan to a broker and all these ... things. When you set up these roles and these benefits modules, all of that can happen automatically. And ... it means so much to those end users who now ... don't have to worry about that stuff. They don't miss sending out emails. It just adds so much. I'm really excited when those things work well, so I like this section.

All right. Thank you so much for that, Eric. Lisa and Stuart, anything else to share regarding that section?

**Stuart Wales:** Yeah. Just to touch back on one of the things you had around values and processes is, that really, processes can speak to the culture of the organization. And the more difficult or more bureaucratic red tape you put around how things need to get done, that speaks to, what you are or what the organization is.

... Especially from a recruiting perspective ... it can be, in terms of first impressions, very off-putting, so you want to think about not just what you're portraying but how you're portraying yourself as an organization. And really thinking through, again, back to the value-adding steps and making sure that the things that are selected to be done are deliberate, intentional, [and] have purpose and meaning without detracting from what you're trying to do as an organization.

**Atokatha Ashmond Brew:** Thank you, Stuart. We have so many questions coming in. I think that we can pivot here and get to some questions, and then I know that you had some final points that you wanted to share with our audience as well.

So, one question that has come in is from someone who says they sit on a board, and they are wanting to "rightsize" the information that you all shared for the organization that they serve, even though they don't have a lot of internal insight of where the breakdowns may be. But their intuition, of course, is telling them that they need to consider such.

**Lisa McKeown:** Stuart, did you want to take that one?

**Eric Salyers:** I had a hard time hearing the question, like, what's the actual ask?

**Atokatha Ashmond Brew:** The question is around a board member who's saying that they ... believe that the organization they serve on would benefit from not only hearing this conversation, but also implementing a new HR [system] or considering an HR tech assessment.

And I guess the question has to do with, how do they engage and introduce the concept within that organization?

**Stuart Wales:** Yeah, I think that really, again, speaks to whether business objectives are being met. And, looking at your key progress indicators about what is really moving the organization forward. If there really aren't goals around any areas where HR technology might be able to assist, then, there should be something around that. It could be something just as simple as making sure that HR is evaluating processes to make sure that ... the candidate pool is as large as it can be. So, [it's about] really evaluating the recruiting process to make sure that we're getting the biggest pool to get the best talent that we can, just as an example.

There [are] a lot of HR metrics that we can start pulling from, that can help to identify areas that might be where HR technology could be considered. But I would start from a data-first perspective, put the goals around that, and then let that drive the business need to make a decision to say that HR technology may or may not be useful in those instances.

**Lisa McKeown:** ... Atokatha, I just want to add that for these types of projects, the fact that a board member is asking that question [indicates] that [the] organization is going to benefit simply from the board member saying — to whomever oversees, HR would oversee the technology — they would be very welcoming of that support and that champion for a project like this.

So, I think it's just a matter of all of those things that Stuart is saying ... But just beginning the conversation ... of approaching the person with the individuals or the department, and just saying, "I think we should open up a dialogue about: Could an HR technology help make the organization more effective and more efficient and more welcoming?" And I would think that, if it's coming from a board member, knowing that there's already a built-in champion to move this forward would be a big, big plus.

**Atokatha Ashmond Brew:** Great. Next question is, what is the typical payback for an investment in [an] HCM system?

**Lisa McKeown:** Payback, hmm.

**Stuart Wales:** Yeah, the payback period is typically around five years, I'd say. Generally speaking, we recommend clients re-evaluate their current technology landscape at least every five years, just because there's always new developments that are on the market. Beyond a finance perspective, even the current vendor solution may not continue to align with business objectives as those change over time. But, yeah, I mean, the payback period is typically five years.

**Atokatha Ashmond Brew:** Great. Thank you so much for that, Stuart. Someone is asking if you all have any tips to offer for working with a consultant or consulting group to create that set of business requirements?

**Lisa McKeown:** Well, we are that consulting group. Actually, was that a Nonprofit HR person asking that question? Because that was beautifully pitched. We actually do work a lot with clients that are looking to do a couple of things, assess the current system [with which] they are so frustrated, they want to move away, and usually, we can go in and sort of help them to assess that.

And also, we'll come in and start this work by doing an assessment of a technology need. So, thinking about helping you evaluate the people in the process and also, some of the policies. What are some of your compliance pain points that a system could also help you support? But we do that now with clients and not only have we done it with clients but we've sat in-house and had to be the end users, the managers, the overseers, responsible owners of these systems as well. So, we understand, you need to build your business case sometimes, and you ... need to get organizational commitment to the cost — the people commitment and ... time commitment — to get these things done.

So, we can certainly, as an organization and as a team, support you to help think through these ... three P's, the people, process and the policies.

**Atokatha Ashmond Brew:** Yeah, next question is how can you scout new HR technologies for DEI elements?

**Stuart Wales:** That's a really broad question. I think it depends on what your ultimate objectives are. Because it is such a broad question, and it could go in a lot of different directions. I think from a baseline perspective, just ensuring that you have good data capture is primarily important because you need to understand the population that you're trying to analyze, first and foremost. Without that as a kind of a basis, you're not really going to be able to evaluate any of your DEI initiatives very effectively.

We come across that, particularly within compensation as part of another area of our total rewards practice and there's equity assessments that we do. And we find, a lot of times, that organizations aren't necessarily collecting all the data that we would like to see as part of those types of assessments. We might just have age, gender and race, obviously. But that may be all the information that we have to work with, and there's a lot of demographic information out there that helps us to better analyze a given population and make better-informed decisions around how to then address specific DEI initiatives and identify if there's even any risk for an organization, just from a compliance standpoint.

So, I would say, again, the conversation on that could go in a lot of different directions. I'm sure we could find a whole other webinar on that alone, but from a base standpoint, I would recommend, look at your data capture processes and look at the data that you're collecting to first be able to provide a baseline for evaluation for your DEI initiatives.

**Lisa McKeown:** Yeah, and Atokatha, the only other thing I would add to that is ... to consider what we talked about when we were talking about the people that would be using the system, making sure you've got equitable access. Whether that be through a laptop, through a tablet, through a smartphone, whatever way you want to make sure that staff are able to easily access the benefits of the technology, and be able to equally understand how to use it, and have opportunities to access it through different means as well.

So, [it’s about] ensuring, and even in multiple languages if it has to be ... most systems can support through tablets and smartphones, and they have language options as well. So ... ensuring that the technology you select is able to support whatever you need from that perspective as well.

**Atokatha Ashmond Brew:** Great. Thanks for that. One person says that they have traditionally used their HCM more for information repository and also, to capture information and report out the current state. But they've not had much experience with predictive analytics and some of the things that you all were talking about earlier. How can they transition to something that's a bit more futuristic versus reporting out on the status?

**Stuart Wales:** Yeah, so most HCM vendors have some sort of built-in capability to do that already, so if that isn't a part of your suite of services, I would certainly reach out to your vendor to ask them what they offer with respect to that. Even if you don't have that currently, or it may not be available, there's a lot of reporting that you can pull out of your system to then run your own analytics. Depending on the size of your organization, the cost of the analytic solution may not be worth it to you. But I would really want ... for anyone trying to identify [a solution to ask:] What are the metrics that you're looking to have? And, identify those. Because if you're only going to look at a few key performance indicators, then it's really not worth the cost to add in the analytic solution. And it's something that you could easily kind of calculate on your own and track over time.

So, yeah, I'd say, again, reach out to your vendor, but first really ... identify, what those metrics are. Why you need them for the business, why it's important to the business [and] what objectives are you trying to measure that will help to inform that?

**Atokatha Ashmond Brew:** Lisa, Eric, anything to add?

**Lisa McKeown:** Yeah, I think I would only add ... that a lot of technology solutions have manager self-service and employee self-service, so if you're finding that you're running a lot of reports, and pulling data out for future state, simply because you haven't optimized some of those other features ... just [create] employee self-access [to understand], "Well what are my benefits? Or, "I need to change my address" ... For some managers [self-service you can access] who are their team members? Who reports to them? What are their salaries? What is their job title? Some of the other data, as well.

If the reasons why you're just running data on the future state — things like turnover — ... is it that you could find ways to share information more directly through the tool itself with those that need to have certain bits of information? Creating dashboards might be a way to ... do that. So, speaking directly to what Stuart said, think about the metrics you need, but then also think about the ways in which you can communicate those metrics so you're not having to continually run reports to refresh [them] and share them out ... So, something else to think about along that line too.

**Atokatha Ashmond Brew:** Great. Thank you.

So, I wanted to make sure we had time to focus on that final P and that is policies that organizations need to consider when they are determining whether or not they are ready for a new HCM. Who would like to ... kick that one off, Stuart?

**Stuart Wales:** Sure.

So again, the general principles here really are similar to processes and making sure that your policies are really achieving the desired business outcomes that you're expecting them to. Are there other ways to achieve the same business outcomes that align with best practices? And then, additionally looking at whether your policies might either be directly or even indirectly, in conflict with federal, state or local regulation.

I think ... we find from time to time that some organizations have policies that were really ... a solution in search of a problem ... They ... were trying to preemptively, deter some sort of behavior, whatever it might be. But when it came time to ... apply those business rules from a technology perspective, we couldn't really do anything with them. We had to rethink: What are we really trying to achieve through this policy? And how might we be able to turn around to still get to the same place without making it more confusing for employees? And, again [it is about] being able to get to a best practice situation, where [policy] could be adopted for technology.

I think there's a lot of compliance, from a policy perspective, that needs to be handled from a technology method, like the ACA, OSHA. There's a lot of things that will enable you as an organization to stay compliant. We want to make sure that, [consider] ... wage labor, that as we configure these things, that they're still achieving business outcomes. But again, [it's about] making sure that you're not turning a blind eye to the legal aspects of a policy that might be in place.

I think some places where we were seeing that work really well have been primarily with a benefits module implementation ... off the top of my head with one client. They really had a strong policy around benefits eligibility and it was really defined. They had five different eligibility types, all with different rules. They had a beautiful chart ... created, that laid out each benefit type ... which meant that [specific] class was eligible for those benefits. We were able to take that information to not just only set up the module, but also create different testing scenarios to make sure that each benefit class user experience was perfect, and that each of the different populations only saw the benefit that they were eligible for as part of open enrollment.

So, they made it, again, really easy to move through the implementation of that particular module so that we're not wasting any time trying to go back and figure out — who should be seeing what? ... Enrollments were, again, as accurate as possible there.

On the lessons learned side, with organizations that we've come across, one organization that comes to mind had a paid lunch policy for all staff, but the application of that policy within their HCM, unfortunately, created compliance issues under local wage and labor laws. They were subject to a collective bargaining agreement, which complicated matters ...

Ultimately, there were other ways to comply with wage and labor laws and still comply with what was under the collective bargaining agreement, but we [needed] to make sure that the system was accurately tracking the time under the statute to make sure that that piece was compliant first before the organization could have been sued for the lost wages under that particular statute.

I've also seen another organization [as an example]: [It] had a vacation policy ... that didn't necessarily follow best practices. They were previously ... manually tracking codes and usage, but they wanted to move it all within their HCM.

They had a policy [they] set up such that there was a partial award at the beginning of the year and then [employees accrued] the rest of their vacation over time. It doesn't necessarily follow best practices. They wanted to make sure that they weren't carrying over vacation from one year to the next — it wasn't hitting the books for financial purposes.

But, when we [tried] to adopt it, the way that they had it set up would have required that there were two different buckets of time for employees to use. It was already kind of confusing as a policy to begin with, and ... that would have just made it worse.

So, after we ... talk through, "Well, how did this policy come to be," with the client, they said, "Well, we want to make sure that employees have time to use at the beginning of the year. But, we don't want to give them everything all at once." So, they ... tried to split the difference to ... eliminate as much risk as possible for [the] organization.

When we talked about it, it wasn't really that big of an issue because, for the population of their staff, there was a very good retention rate. Many of the folks that were there had been there for years. The risk really wasn't there, and ultimately, they ended up being OK with just moving to a fully accrued policy and allowing employees to go into the negative a little bit.

We've seen other organizations — and this wasn't actually a lesson learned, but a mixed bag about where the HR technology industry is right now, as opposed to progressive policies that might be in place.

So [we were] working with a client [that had] a medical benefit cost share that's based on a percentage of the employees' salaries, as opposed to a percentage of the premiums. And [it was] really a progressive policy, from an equity stance, toward access to healthcare and making sure that those who aren't making as much within the organization can afford good quality healthcare that the organization wants to provide as a benefit.

But, unfortunately, it's hard ... Not many vendors are able to actually facilitate that kind of setup on the back end — to be able to calculate based [on] someone's salary. We're still ... very much stuck in the traditional sense ... based on the cost of the premium, not necessarily another factor. So that's a place where we're looking to see some progress within the industry. Not quite there yet. But that, again, [it is] another way in which policy aspects can help influence decisions made around technology.

**Atokatha Ashmond Brew:** Right. Thank you so much, Stuart. And Lisa, I know you had some overarching points that you [wanted] to make regarding policy.

**Lisa McKeown:** Yeah, I think Stuart covered a lot of them.

And ... as you think high level about people and process, you want to ... really keep in mind that when you're considering a technology that you think about, of course, the people, and then how you can evaluate your processes to be sure you are ready. And then ... that third leg of the stool is, really [ensuring] that you're looking at all of your policies that support how the organization stays compliant and keeps up-to-date with best practices.

So, hopefully a technology that you engage with will assist you ... with the compliance aspect of it, such as an ACA module, and leave and tracking time — all of those things. But hopefully, you'll also engage with a vendor that really supports ensuring that they're making updates to their technology that will help you to stay ahead of the curve a little bit and stay competitive

So, I think Stuart covered a lot of the things that I would recommend saying, I just think ... consider your compliance risk areas. Ensure that a technology can support you in closing any gaps in that area.

**Atokatha Ashmond Brew:** Thanks. Eric, do you have anything you'd like to add?

**Eric Salyers:** No, I think they summed it up pretty well, thank you though.

**Atokatha Ashmond Brew:** Great. All right, so we have a couple more questions to get to before we go back to your final thoughts.

One of those questions is, what problems won't a new HR tech solution solve?

**Eric Salyers:** Policies.

**Lisa McKeown:** Processes, and people not ready to support your system, so the opposite of everything we've just said. But let's — I'll let Stuart ... expand on that a little bit.

**Stuart Wales:** Yeah. Yeah, HR technology is a tool.

It is not meant to — it's meant to support and improve a lot of things, but a tool is only as good as the environment it's in. It's not going to affect culture, it's not going to fix [or do] anything on its own. It's really thought and care that is put into the evaluation and selection of the product, how it's communicated to employees, be the processes — again, the three Ps — really the people, the processes and how all that influences the technology.

You could select the most expensive ... "best product out in the market," and have a really poor implementation and it can make things worse. The technology itself isn't going to magically fix everything that you thought it might, it [requires] active involvement and feedback — continuous feedback — from multiple different perspectives and [with] ongoing care. Even beyond implementation, there's ... a continuous need to evaluate whether or not this [technology] met ... business objectives. Can we configure something differently to continue to build on that positive employee candidate experience?

**Atokatha Ashmond Brew:** Thank you. And we've had this question a couple of times. It has to do with the size of the organization and different mission types ... and does it matter?

**Stuart Wales:** Not specifically. I think there are some vendors that cater to certain missions more than others, but that doesn't necessarily mean that they're not as capable functionality wise to meet the needs of a broad spectrum of missions.

Organization size can play a factor somewhat, and that's mostly from a vendor perspective and their target demographic. I think for a lot of the organizations that ... are probably under 200 — definitely under 100 — there are really only a handful of vendors that play in that market and work best with that market from a functionality perspective as well as a cost perspective. So, I think ... in that respect ... [there are] more limited options. But even then, those options still are great across a multitude of missions.

**Atokatha Ashmond Brew:** Great. Well, I think this last question will actually tie in nicely to [the] final points that each of you wanted to offer, and this one is around immediate action items that will help organizations assess their current HMS capabilities regarding their people policies and processes. And so, I'll just leave it in that general realm and allow you to speak to that as you're offering your final thoughts.

**Stuart Wales:** OK. I think, yeah. Leading into some final thoughts, we really live in a consumer-driven society. And HR technology is first and foremost ... a tool that is used by everybody in the organization ... You need to keep that end-user experience in mind. It is not just about the administrators just trying to get payroll done — just trying get through HR processes — it is also about staff and ... candidates.

And, looking at it from that perspective, if you have issues with user adoption, it's time to think about things differently ... It is [about] assessing the current state to identify where those pain points are and why adoption rates aren't higher. That's very heavy on the people side of things, but it could be ... processes and policies as well. But ultimately, employees expect more from technology, and that's not to say that everything needs to [have an] all-in-one solution.

There could be multiple solutions. I very much like to use the example of a smartphone [where] you have multiple apps to tend to multiple different needs ... You want to make sure that you have the best solution to be able to facilitate the work that employees are doing.

... HR technology shouldn't be an afterthought, and oftentimes we find that it is. IT doesn't necessarily pay as much attention to [HR technology] as [it does] other areas of business, but it is still very much part of what helps to keep the business running and keep things moving forward. And I recommend partnering with internal IT if they're available to assist with that assessment. They're running much [of] the same processes that we're recommending here, and trying to look at a holistic experience for staff and again, the tools that they need to get the job done.

I think [in terms of next steps,] those [factors] are really where I would leave things. In terms of next steps, I think there's ... a lot to do with as part of an HR readiness assessment for technology. But, again, definitely think about — first and foremost — what are the business objectives? What is the user experience that you want to have? What is the culture that you want to convey?

Because every investment in technology — whether it's HR or not — speaks to your culture. And if that's not there — if your technology doesn't speak to the culture that you want to have — then that's another consideration and one more thing to build a business case around.

**Atokatha Ashmond Brew:** Any final thoughts you'd like to offer, Lisa?

**Lisa McKeown:** Yeah, I think I would add that if I were sitting within an organization, knowing that we should probably consider a technology, I might approach it in a big thought way first and just grab people together within the organization ... your payroll folks, your IT folks, maybe a communication, or your recruiting, your HR, team. Those that really touch a system like this and really think about: What are some of the ways you're hearing feedback about HR processes from staff? Staff are very vocal about how long something might take or how something didn't work for them.

... [Consider] what your pain points are and just [gather] people together. [Get] some first thoughts down on paper about: What are some of the big picture things that you would like to solve for when it comes to your HR processes? What are some of the areas of risk? Compliance? What are some of the people needs that you think you might have or might need?

And, just start there. Start big. Then, start to whittle down and fill in some of the details that'll help you get to a place where you might have a better sense of the type of ... system that you might need and ... what ... to look for ... to get some knowledge on — and get a demo on — to try to assess.

So, that's how I would start if you're not quite sure where to begin.

**Atokatha Ashmond Brew:** Thank you, Lisa. And Eric, do you have anything to offer before we close?

**Eric Salyers:** Sure, I'll pose it similarly to Lisa. Like as I was sitting in house, and I was watching this today, I guess I might tell me, “Keep an open mind when you're going through your assessment.” I mean, each of you probably have a system right now, it's probably not likely that you don't have anything. So you probably have something ... It's really easy to jump straight to that, “I need to have a new product. I need to have a new system.” I walked into the doors of two organizations in the past three or four years and they've met me at the door with that, like, “We got to have a new system. This one's awful.” The employees are all echoing the same thing.

Then, we go through an assessment and find out, “You actually have a really robust product. You just had a sloppy implementation. You had a poor employee communication rollout plan. Everyone's experience was bad and poor,” and now — I alluded to this point earlier in the conversation — but it can have a big driving impact on the success of your solution.

So, keep an open mind. You might find out that you've got the right product and the right system. You just need to go back and revisit it, reduce some things, build some other things out, polish some things. I think that’d be my tip.

**Atokatha Ashmond Brew:** Thank you so much. Thank you to each of you on the panel today for your lively discussion, and all the great information that you shared with our community. We want to let you all know that we've got more webinars coming up this year. Visit us online at nonprofithr.com/events to see what else is next. We look forward to seeing you on a future webinar.

And please stay behind and do the feedback survey that will pop up once this webinar concludes. We ... use your feedback to inform future topics and also to help us ... ensure that we are delivering quality webinar experiences. Thank you again for attending. Thank you again for our panelists. We'll see you soon!

**Eric Salyers:** Thanks, Atokatha.

**Atokatha Ashmond Brew:** Thanks, everybody.