



MRA
HR Conference
Elevating the Employee Experience


Session 3A:
Embracing Technology




Presented by:
Tricia Shields & Chris Krause, *Naviant, Inc.*

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Your Presenters




Tricia Shields
VP of Human Resources



Chris Krause
VP of Consulting Services

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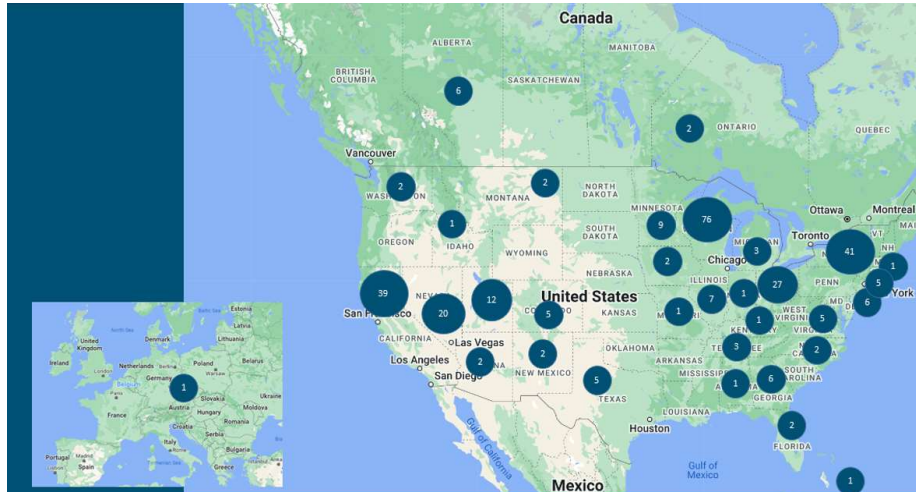
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Naviant Customer Landscape



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Poll Anywhere Question

QUESTION: What is your top priority as an HR leader in 2023?

1. Leader and manager effectiveness
2. Organizational design and change management
3. Employee experience
4. Recruiting
5. Future of work

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*thank
you*



Your Presenters



Iricia Shields
VP of Human Resources



Chris Krause
VP of Consulting Services

Your Presenters



Tricia Shields
VP of Human Resources



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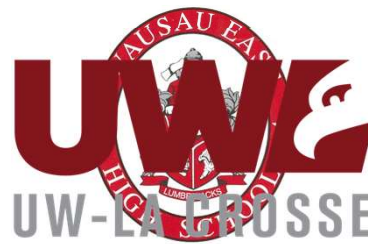


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Your Presenters



Chris Krause
VP of Consulting Services



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When poll is active, respond at pollev.com/mraconferences250
Text **MRACONFERENCES250** to **22333** once to join




What is your top priority as an HR leader in 2023?

- Leader and manager effectiveness
- Organizational design and change management
- Employee experience
- Recruiting
- Future of work

Start the presentation to see live content. For screen share software, share the entire screen. Get help at pollev.com/app

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Gartner HR Focus 2023 Priorities

-  1. Leader/Manager Effectiveness
-  2. Organizational Design and Change Management
-  3. Employee Experience
-  4. Recruiting
-  5. Future of Work

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The Early Days of Technology



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Technology Today



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What is technology?



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Technology Defined

“a scientific method of achieving a practical purpose.”
- Merriam-Webster

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Naviant's Embracing Technology



Recruitment - You Tube Shorts



Candidate Management – Wedge Recorded Interviews



Employee Experience – Process Automation Technologies

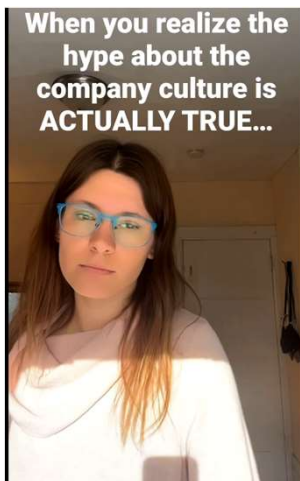
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Videos



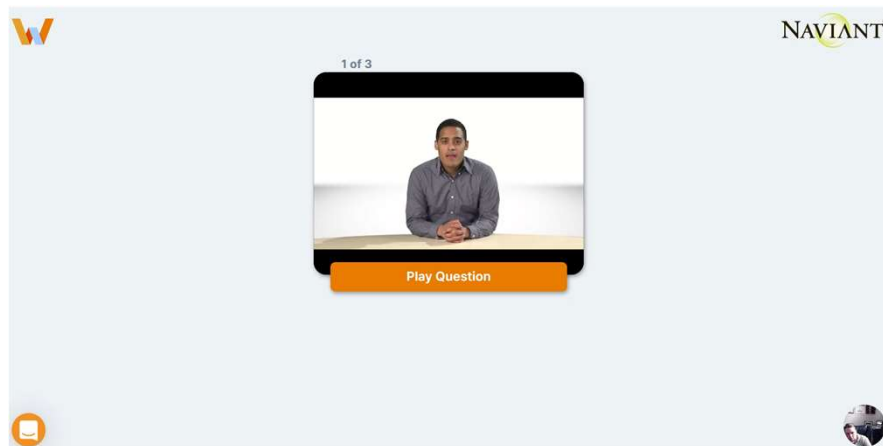
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Videos



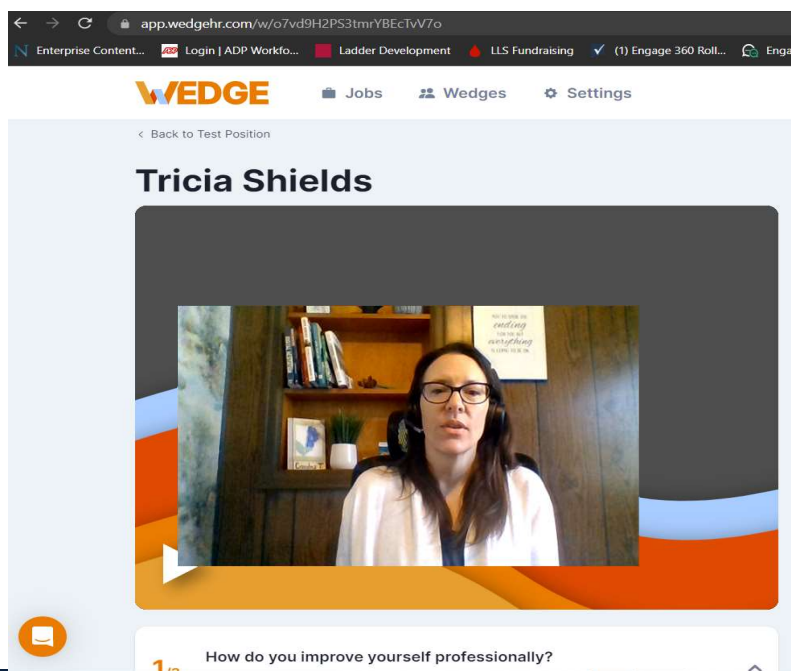
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Videos



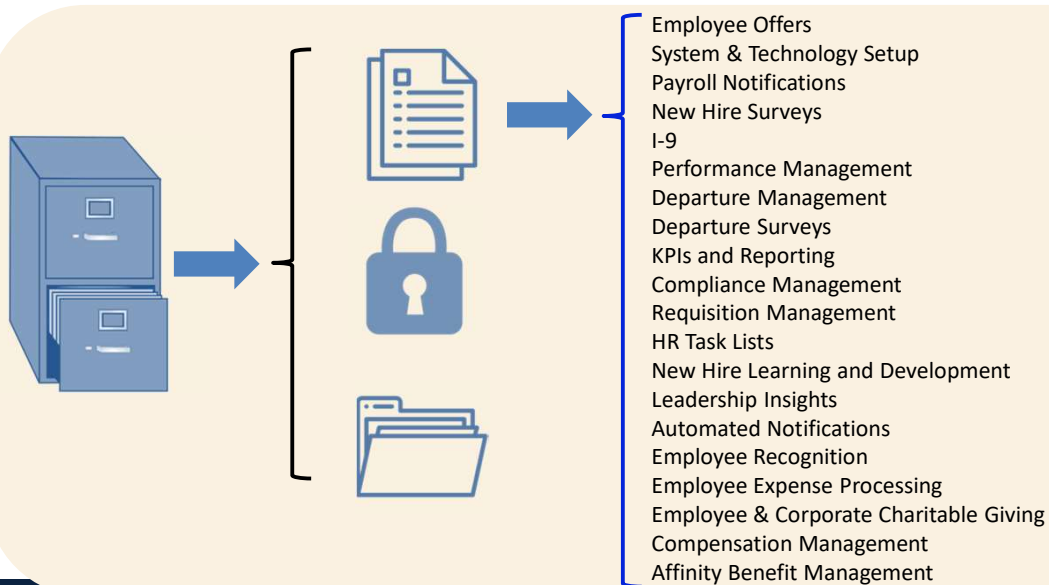
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NAVIANT SUCCESS STORY



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What is your greatest hesitation in adopting technology?



39%

LACK OF TIME



36%

FEAR OF SECURITY OF
CONFIDENTIAL DATA



22%

LACK OF FAMILIARITY WITH
TECHNOLOGY



3%

FEAR OF CHANGE

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How would you rate your organization's adoption of technology?

18% Our HR data is primarily paper based and we process it manually.

18% Our HR data is digital and we process it manually.

49% Our HR data is digital and we process some of it using automation.

15% Our HR data is digital and we process it using automation and integrations.

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*But first,
snacks*

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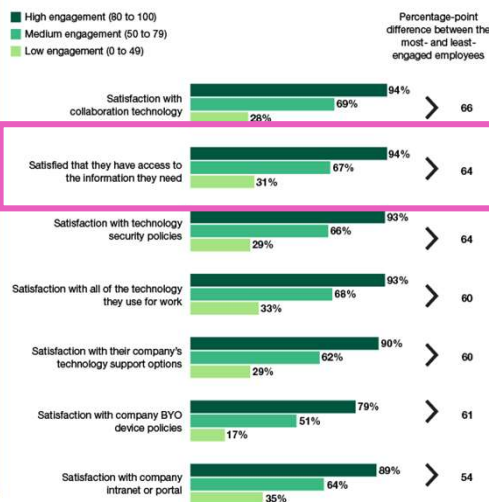
Why Embrace Technology?



Why Embrace Technology?

Highly engaged employees show strong levels of satisfaction with the ability to access information they need to do their job

Technology satisfaction by employee engagement
(4 or 5 on a scale of 1 [dissatisfied] to 5 [extremely satisfied])



Why Embrace Technology?

ANYWHERE-WORK WILL DEPEND ON THE FLOW OF CONTENT AND COMMUNICATION



Highly engaged employees value their access to information and the ability to collaborate with their peers.



Information sharing - not hoarding - behaviors must be encouraged.



Tacit and implicit knowledge (what's in our heads) must be expressed and synthesized.



Home, hybrid, and remote workers need a level playing field - technology as an enabler.

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How To Embrace Technology?



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How to Embrace Technology?

Planning



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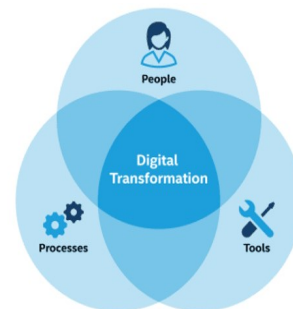


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How to Embrace Technology?

Planning

- What does our current process look like?
 - Are there steps that we can eliminate?
 - Are there automated validation steps that we should add?
- What steps can we use technology to improve?
 - Does it require a human to make a decision?
 - What automation can be included to improve the process?
- Who needs to be at the table in designing it?
 - Subject Matter Experts (SMEs)
 - Leadership
 - Information Technology



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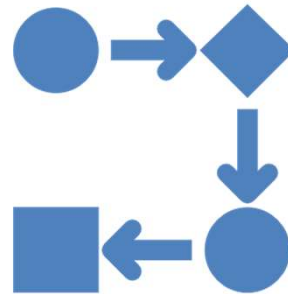


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How to Embrace Technology?

Process First Approach

Before you implement technology to automate a process, you need to spend time improving the process. Otherwise, you are leaving precious time and money on the table.



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How to Embrace Technology?

Process First Approach

“By concentrating *first on process* and *how people engage in the process*, and then *later on technology to enable the process*, we design the most efficient way to *accomplish your goals*.”



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Where to Embrace Technology?



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Poll Anywhere Answer

QUESTION: What is your top priority as an HR leader in 2023?

1. Leader and manager effectiveness
2. Organizational design and change management
3. Employee experience
4. Recruiting
5. Future of work

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HR Focus 2023 Priorities



Organizational Design and Change Management

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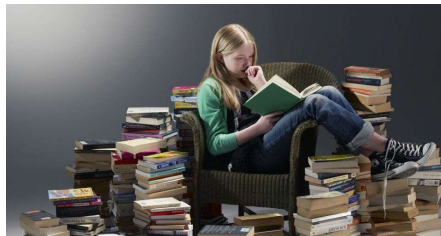
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Challenge

Difficulty managing distribution & tracking of required reading policies and procedures.



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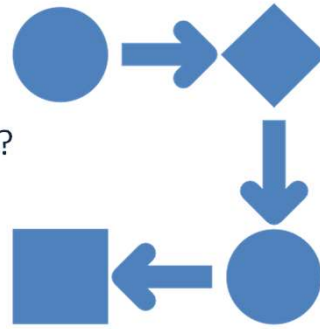
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Planning

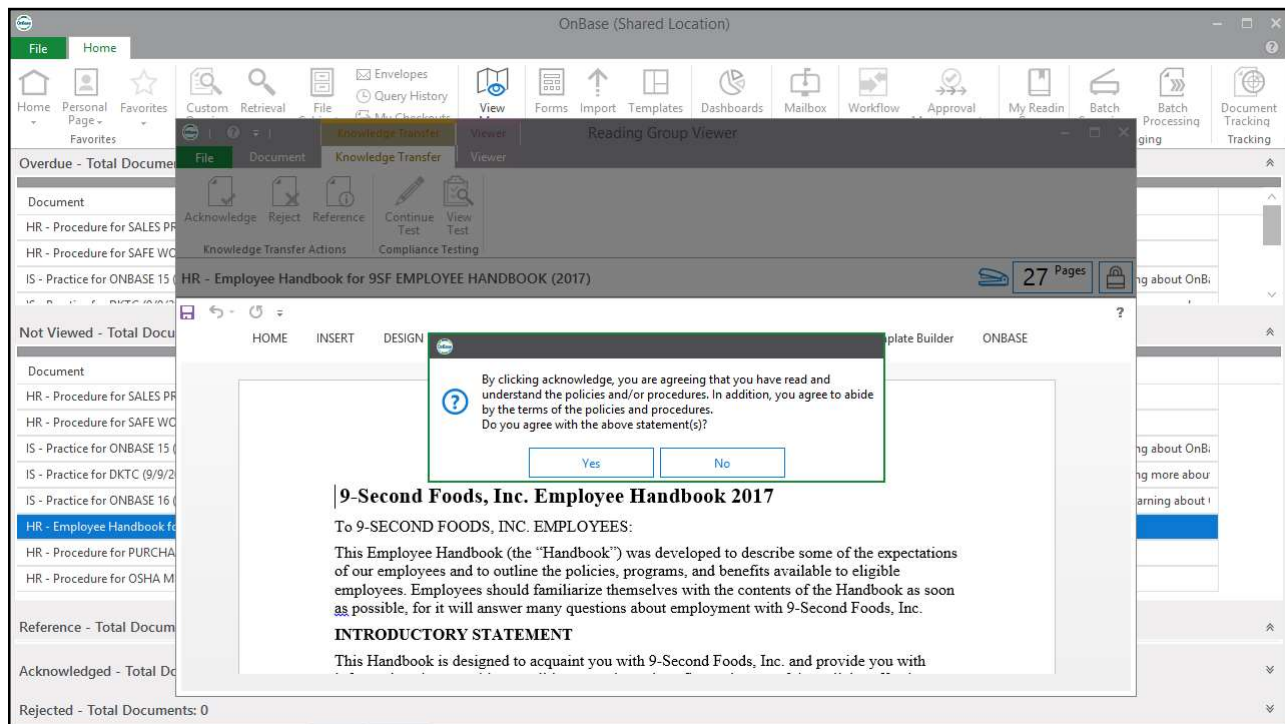
- What does our current process look like?
 - Paper-based
 - Manual distribution via Email and tracking
- What steps can we use technology to improve?
 - Electronic document
 - Automate distribution and tracking
 - Expand insights to ensure compliance
- Who needs to be at the table in designing it?
 - Subject Matter Experts in Policies and Procedures
 - Leadership/Managers



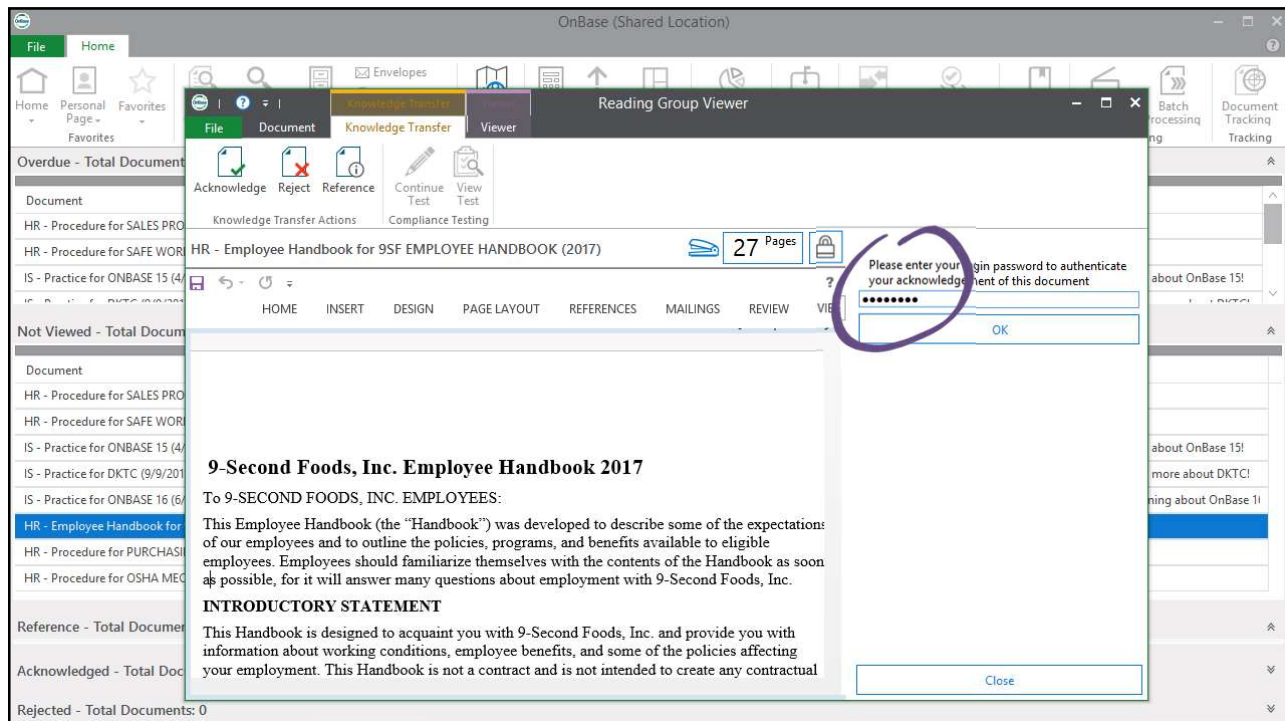
Technology Solution

Document Knowledge Transfer & Compliance

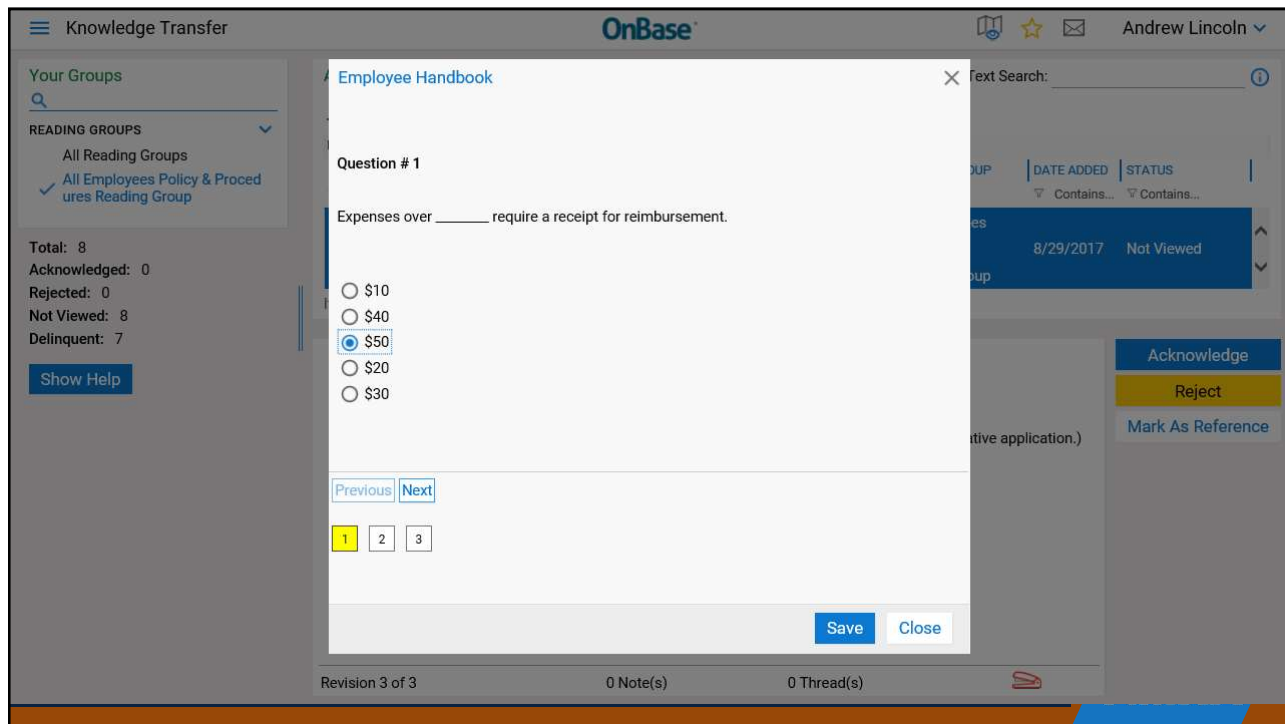




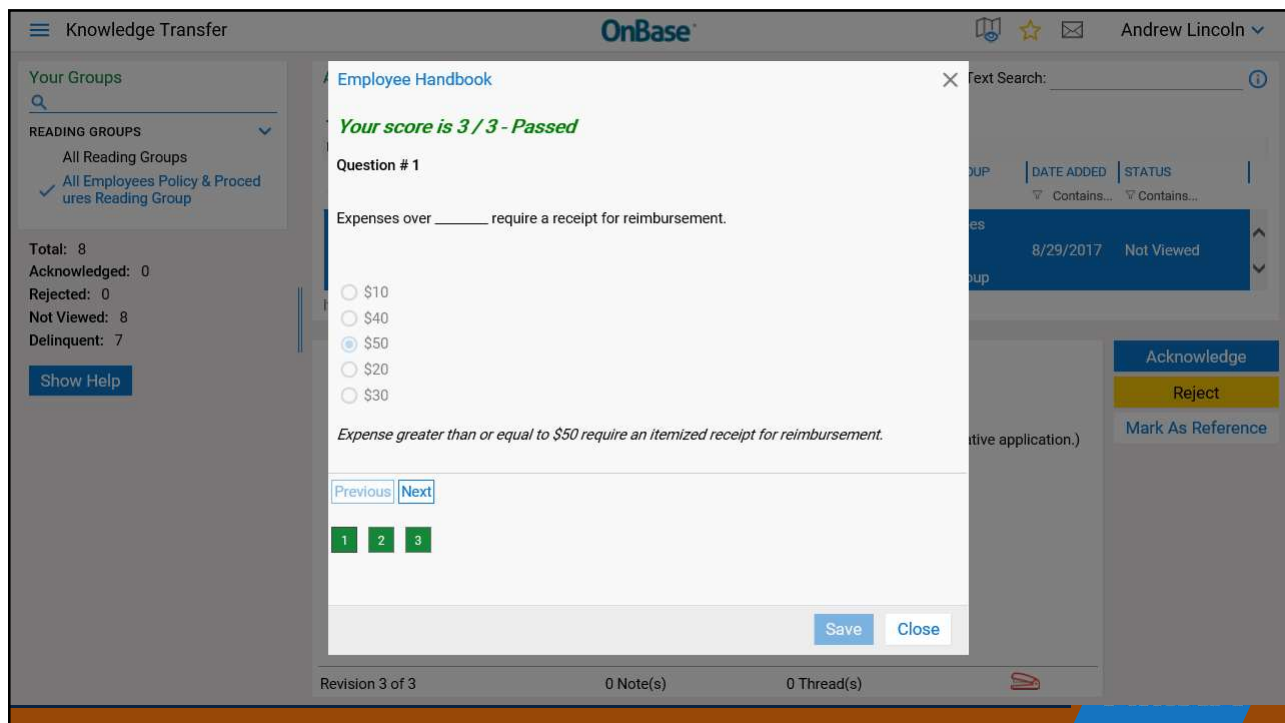
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Knowledge Transfer OnBase®  Cindy Smith

Your Groups

READING GROUPS

- All Reading Groups
- All Employees Policy & Procedures Reading Group

APPROVAL GROUPS

- All Approval Groups
- Policies Approval Group

ADMINISTRATION GROUPS

- ☒ All Employees Policy & Procedures Reading Group

All Employees Policy & Procedures Reading Group

MEMBER ADMINISTRATION DOCUMENT ADMINISTRATION USER ADMINISTRATION APPROVAL GROUPS

[Email Delinquent Users](#) [Re-Add for Selected User](#) [Remove Reading Requirement](#) [Export Report](#)

DOCUMENTS

Drag a column header here to group by that column.

DOCUMENT NAME	REVISION	STATUS	DATE ADDED	DATE APPROVED	ADDED BY
HR - Employee Handbook for 9SF EMPLOYEE HANDBOOK (2017)	3	Approval Not Required	8/29/2017		Cindy Smith
HR - Procedure for PURCHASING	2	Approved	10/29/2012	1/29/2013	Cindy Smith

USERS

Drag a column header here to group by that column.

USER	REAL NAME	STATUS	DATE DECIDED	DATE AVAILABLE	REJECTION REASON
ANDREW LINCOLN	Andrew Lincoln	Acknowledged	8/29/2017	8/29/2017	
MANAGER	Cindy Smith	Acknowledged	8/29/2017	8/29/2017	
CINDY SMITH	Cindy Smith	Not Viewed		8/29/2017	
JANE HARPER	Jane Harper	Partially Viewed		8/29/2017	

[Remove](#) [Re-Add for All Users](#)

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OnBase (OnBase)

File Home Contract Manager Briefcase

Home Personal Favorites Custom Queries Envelopes Certified Records View Map Forms Import Dashboards Mailbox Workflow Approval Management My Reading Groups Approval Viewer Imaging Tracking

Overdue - Total Documents: 7

Document	Deadline Date	Document Rev	Reading Group	Date Added	Status	Comments
HR - Procedure for SALES PROCESS (10/29/2012)	2/5/2013	1	All Employees Policy & Procedures Reading	1/29/2013	Delinquent	
HR - Procedure for SAFE WORK (10/29/2012)	2/5/2013	2	All Employees Policy & Procedures Reading	1/29/2013	Delinquent	
IS - Practice for ONBASE 15 (4/22/2015)	4/29/2015	1	All Employees Policy & Procedures Reading	4/22/2015	Delinquent	Thank you for learning about OnBase 15!
IS - Practice for DKTC (9/9/2016)	9/16/2016	1	All Employees Policy & Procedures Reading	9/9/2016	Delinquent	Thank you for learning more about DKTC!
IS - Practice for ONBASE 16 (6/7/2016)	6/14/2016	1	All Employees Policy & Procedures Reading	6/7/2016	Delinquent	Hope you enjoyed learning about OnBase
HR - Procedure for PURCHASING (10/29/2012)	2/5/2013	3	All Employees Policy & Procedures Reading	1/29/2013	Delinquent	

Not Viewed - Total Documents: 8

Document	Deadline Date	Document Rev	Reading Group	Date Added	Status	Comments
IS - Practice for DKTC (9/9/2016)	9/16/2016	1	All Employees Policy & Procedures Reading	9/9/2016	Delinquent	Thank you for learning more about DKTC!
IS - Practice for ONBASE 16 (6/7/2016)	6/14/2016	1	All Employees Policy & Procedures Reading	6/7/2016	Delinquent	Hope you enjoyed learning about OnBase
HR - Employee Handbook for 9SF EMPLOYEE HANDBOOK (2017)	8/29/2017	3	All Employees Policy & Procedures Reading	8/29/2017	Not Viewed	
HR - Procedure for PURCHASING (10/29/2012)	2/5/2013	3	All Employees Policy & Procedures Reading	1/29/2013	Delinquent	
HR - Procedure for OSHA MECHANICAL PRESS (10/29/2012)	2/5/2013	2	All Employees Policy & Procedures Reading	1/29/2013	Delinquent	

Reference - Total Documents: 0

Acknowledged - Total Documents: 0

Rejected - Total Documents: 0

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HR Focus 2023 Priorities



Employee Experience

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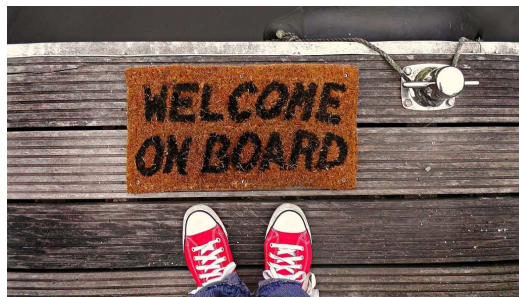
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Challenge

Difficulty managing tasks for and creating an engaging onboarding experience for new employees.



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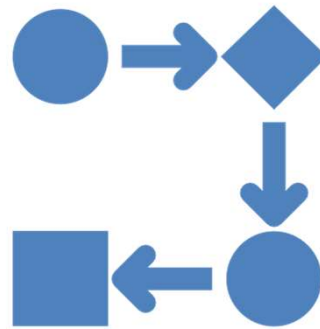
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Planning

- What does our current process look like?
 - Keeping lists in spreadsheets
 - Emailing Requests to Departments to Complete Tasks
- What steps can we use technology to improve?
 - Automate the Creation of the Tasks with Due Dates
 - Simultaneous Task Execution Across the Organization
 - Automated reminders for Task Completion
- Who needs to be at the table in designing it?
 - Subject Matter Experts in On-Boarding Process
 - Hiring Leadership/Managers
 - Information Technology/Security



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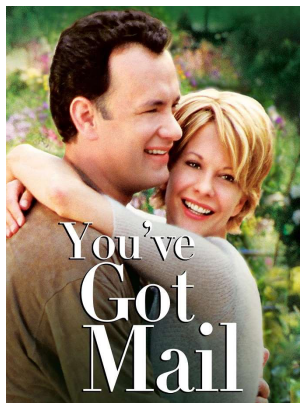
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Technology Solution

Outlook Integration and New Hire Portal



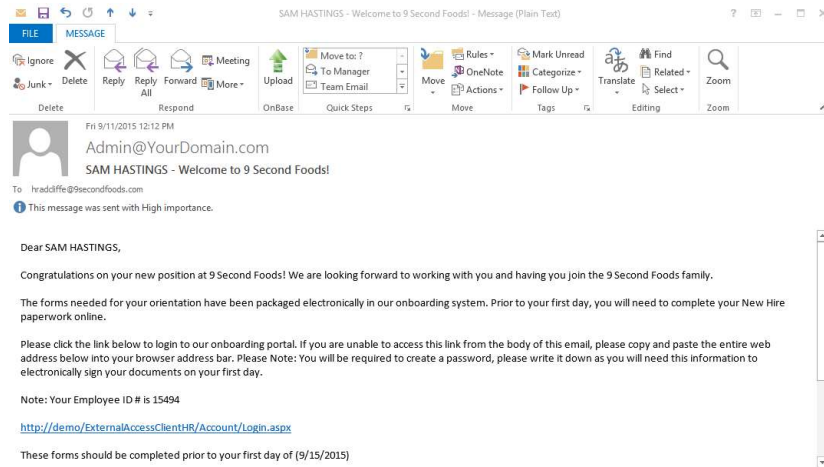
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Automated Welcome Email



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[New Hire Portal](#)
[User Settings](#)
[Contact Us](#)
[Logout](#)

Welcome Video

Policy Instructions

Please review the policies outlined below and acknowledge them before your first day. Please ensure you read and fully understand the policy before acknowledging.

Policies to Acknowledge

Document Name	Read By
COMPUTER USAGE POLICY - 2014 - 11/19/2014	
CORPORATE BRANDING PRACTICES - 2014 - 11/19/2014	
HR - EMPLOYEE HANDBOOK FOR ALL EMPLOYEES (2014) - 2014 - 11/19/2014	
SAFE WORK PROCEDURES - 2014 - 11/19/2014	
CELL PHONE USE POLICY - 2014 - 11/19/2014	

Instructions for New Hire Forms

Please complete the Direct Deposit Form and an Emergency Medical Information Form before your first day. Please complete all forms before your first day to ensure all necessary information is provided.

NOTE: The I-9 and W-4 forms can be accessed by clicking the I-9 and W-4 links below. These forms must be filled out, printed, and brought with you on your first day.

New Hire Forms

Document Type	Name
HR - Emergency Medical Information	SAM HASTINGS
HR - Direct Deposit	SAM HASTINGS

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Customized Electronic Forms

HR - Emergency Medical Information for SAM HASTINGS - 9/11/2015 - Internet Explorer

Employee Information	
Name SAM HASTINGS	Address 4876 BEAR DR.
Employee File Number 15494	City BEDFORD HTS.
Phone (216)824-3982	State OH
Personal Email SHASTINGS@GMAIL.CO	Zip 44146

Emergency Contacts	
In Case of Emergency, Contact: Add	

Medical Information		
Doctor	Phone Number	Office Address
Allergies, Medications, etc.		

Submit

0 Note(s) 0 Thread(s)

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Manage On-Boarding Process

OnBase (OnBase)

Home HR - Employee Lifecycle System Tracking Briefcase Filter

Open Create Delete Add to Favorites Add to Personal Page Save Filter Settings Reset Filter Settings Display Column Chooser Auto Size Column Widths Open in New Window Collapse All Print Print Preview Export to Excel Compose Document Refresh Retrieve all records Display as Dashboard

HR - Employee Lifecycle System Tracking

Filters

My Work Department Groups Employees Search In Progress (1) Active (4) Recently Separated (0) All Employees (5) OB Users (74) Administration

In Progress

Employee ID	First Name	Last Name	Start Date
15494	SAM	HASTINGS	9/15/2015

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System Task
Double Click on Employee ID to View Employee Record.

Employee ID	First Name	System Name	System Administrator
15494	SAM	Voice Mail System	HR Demo User

Comments

Created By: [blank]

System Task Details

System Name	System Department Own	Status
Mobile Device	Technical Support	In-Progress
Voice Mail System	Technical Support	Complete
Phone System	Technical Support	Complete
Internal Employee Access	Human Capital	HR Review
Shipping Access	Human Capital	HR Review
OnBase Access	Technical Support	In-Progress

1 - 8 of 8 records Show 100 records

Department completes onboarding task and status changes for everyone

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HR - Employee Lifecycle System Tracking

Filters: My Work, My System Task (In-Progress) (0), My Back-Up System Task (In-Progress) (0), Department Groups, Employees, Search, In Progress (15), Active (4), Recently Separated (0), All Employees (22), OB Users (74), Administration.

View: Start Date By Department

View: Position

Employee ID	First Name	Last Name	Star
3206	O'SHEA	JACKSON	9/2/
3207	JONATHAN	DAVIS	9/2/
3208	JOHN	ADAMS	9/2/
3209	JAMES	SMITH	9/2/
3210	CHRISTOPHER	WALLACE	9/2/
3211	JOSEPH	SIMMONS	9/2/
3212	ADAM	HOROVITZ	9/2/

Currently viewing 15 of 15 records

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Challenge

Difficulty managing tasks for and creating an engaging/compliant experience for departing employees.



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Technology Solution

- Your embraced technology should enable you to mirror the systematic off-boarding of employees with the most critical tasks being completed first.



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HR Focus 2023 Priorities



Leader/Manager Effectiveness

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Challenge

Creating an engaged performance management system for employees and their managers.



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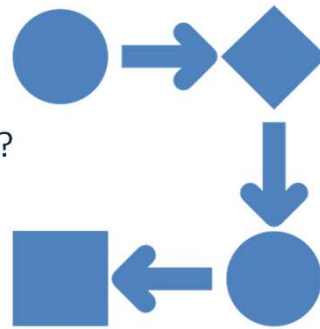
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Planning

- What does our current process look like?
 - Paper-based
 - Department dictated and driven
- What steps can we use technology to improve?
 - Digitize a standard template
 - Automate notifications and tracking
 - Provide ongoing access for continuous feedback
- Who needs to be at the table in designing it?
 - People leaders
 - Employees from various departments



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Technology Solution

- Performance Management Technology



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Employee View of Performance Management

Dashboard Team Dashboard

Created By: MANAGER
5/19/2020 12:11:26 PM

Employee Name: Jacob Welch
Manager: Michelle Henderson
Title: Sales, Manager
Department: Sales

Start Discussion
Create Goal
Create Development
Provide Feedback

To-Do List

Description	Status	Due Date
-------------	--------	----------

Show 100 records

Discussions

Goals

Development

Feedback

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MRA

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Manager View of Performance Management

Dashboard Team Dashboard

Created By: MANAGER
5/14/2020 1:59:29 PM

Employee Name: Jacob Welch
Manager: Michelle Henderson
Title: Sales, Manager
Department: Sales

Start Discussion

My Team

Select an employee

Name
Amanda Morgan
Anthony James
Bella Taylor
Charles Hamilton
Cindy Smith
David Morrison

1 - 12 of 12 records Show 100 records

Discussions

View all previous discussions

Employee Name	Discussion Type	Subject	Meeting Date
Cindy Smith	Regular Check In		5/14/20

1 - 1 of 1 records Show 100 records

Goals

View all goals submitted

Employee Name	Description	Due Date	Progress
Cindy Smith	Test	5/29/2020	
Cindy Smith			
Cindy Smith			

1 - 3 of 3 records Show 100 records

Development

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HR Focus 2023 Priorities



Future of Work

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Challenge

Integrating your HR content with your Line of Business Applications.



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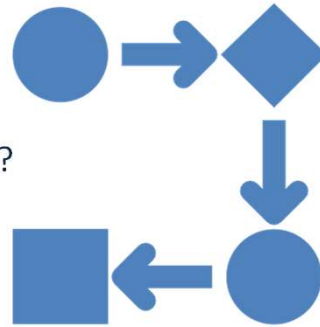
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Planning

- What does our current process look like?
 - All Digital Content is Separate
 - Manual Copying of Information Between Systems
- What steps can we use technology to improve?
 - Leverage Purpose Built Integrations
 - Create Custom Integration with Open API
- Who needs to be at the table in designing it?
 - Information Technology
 - Subject Matter Experts/Department Leaders



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Technology Solution

- Process automation technology integration with SAP



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My Employee File

Search for actions or people...

Dorian Gray (dgray)

Finance, US Bank (B200-0001), Executive Office (EXEC)
Leadership Team BestRun (300), Executive Office (EXEC)
US Bank (B200-0001) (US/Eastern)
Local time: Wednesday, 11:38:40 AM
Business Phone: (313) 458-8888
dgray@bestrun.com

Actions
Header
As of Today

ME
EMPLOYMENT
COMPENSATION
PAYROLL
TIME
BENEFITS
TALENT PROFILE

Personal Information

Personal Information

Effective as of: May 2, 2017

First Name	Dorian	Marital Status	Married
Last Name	Gray	Nationality	United States
Middle Name	-	Preferred Language	-
Salutation	Mr.	Attachment	-
Preferred Name	-	Language Script	-
Gender	*****		
	Show		

Global Information

ONBASE INTEGRATION FOR SAP SUCCESS FACTORS

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You Made It

CONCLUSIONS

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Digital Transformation Journey



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**“You don’t have to be
great to start but you
have to start to be great”**

■ Zig Zigler

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How To Remember



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Thank you!



- It has been a treat to share embracing technology with you!



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