



# HR Conference

Elevating the Employee Experience

## Session 3: Embracing Technology



Presented by:  
Tricia Shields & Terry Weitgenant, *Naviant, Inc.*

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## About Naviant



**NAVIANT**  
Employee  
Landscape

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## About Naviant



**NAVIANT**  
Customer  
Landscape

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*Thank you*  
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Where HR Means Business.

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## Organization's Adoption of Technology

18%

PRIMARILY  
PAPER BASED &  
WE PROCESS IT  
MANUALLY

18%

DIGITAL & WE  
PROCESS IT  
MANUALLY

49%

DIGITAL & WE  
PROCESS SOME  
OF IT USING  
AUTOMATION

15%

DIGITAL & WE  
PROCESS IT USING  
AUTOMATION &  
INTEGRATIONS

## Oreo Types



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## What is your greatest hesitations in adopting technology?

- Lack of time
- Fear of security of confidential data
- Lack of familiarity with technology
- Fear of change

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## HR Platform Technologies

			
Human Resources Management	Human Capital Management	Content Management	Records Management
			
Process Management	Case Management	Learning Management	Employee Self-Service
			
Intelligent Document Processing	Robotic Process Automation (RPA)	Conversational Chatbots	Generative AI

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# Core Technologies

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## HR Platform Technologies

### Core Automation



#### Human Resource Management

Core HR Functions (Budget, Payroll, Benefits etc.)



#### Human Capital Management

Broader & Strategic HR Functions (Talent Recruiting, Workforce Management, Strategic Decision-Making Support etc.)



#### Content Management

Storage & Retrieval of Documents and Forms (Personal Records, I-9s, W-4 etc.)



#### Records Management

Retention Policies & Disposition

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# HR Platform Technologies

## Core Automation



### Process Management

Manage, Monitor, and Automate Business Processes (Document, Transaction and/or Case-centric)



### Case Management

Manage & Direct Work that Crosses Several Platforms (Onboarding Cases etc.)



### Learning Management

Administration & Delivery of Training, Educational and Compliance Content



### Employee Self-Service

Allow EEs to perform HR transactions independently (Integration of other Core Automation Platforms)

# Hyper-Automation Technologies

# HR Platform Technologies

## Hyper-Automation



### Intelligent Document Processing

AI Driven Data Extraction from  
Unstructured or Semi-structured  
Documents  
(Cover letters/resumes etc.)



### Robotic Process Automation (RPA)

Emulate back-office human  
actions with bots  
(Cost-effective method)

## Leading Edge Technologies

# HR Platform Technologies

## Leading Edge



### Conversational Chatbots

Unstructured employee self-service  
with limited scope.



### Generative AI

AI + LLM + Natural Language  
Processing (NLP) like ChatGPT

## Platform Mix Examples



# HR Platform Technologies

## Platform Mix



### Case Management + Robotic Process Automation

Automate onboarding tasks such as EE account setup



### Intelligent Document Processing + Generative AI

Evaluate a historical backlog of resumes & find specific candidates

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## Case Study: Large Construction Management Firm

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## Case Study

### Large Construction Management Firm

#### Problem

High employee turnover  
Large volume of new hires

Manual processes for HR  
functions

#### Objective

Automate new hire  
process, benefits &  
provisioning

Eliminate need for  
employees to come into  
office to handle new hire  
activities

#### Details

Many candidates had  
limited access to  
technology

Solution had to be  
mobile friendly

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## Case Study Cont.

### Large Construction Management Firm

## SOLUTIONS

#### New Hire Processing

Push mobile friendly form to  
candidate

Gather data needed to complete  
new hire forms (W-4, I-9, EEO  
etc.)

Generate & deliver completed  
forms for signature

#### New Hire Benefits

Automate gathering of  
selection & enrollment  
data once an employee  
becomes eligible for  
benefits

Similar to new-hire process

#### New Hire Provisioning

Initiate and track status of  
IT, AP, Transportation, and  
Purchasing setup

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## Key Takeaways



There's no platform or technology mix that is plug & play, and/or meets every company's needs. One solution does not fit all... Like Oreos!



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## Key Takeaways Cont.



Evaluate cloud options & carefully consider ROI. Trend is flattening as cost structures change, but there's still value in lowering capital expenditures.



Always weigh costs of customization against the option of changing your processes.



Be aware, but careful when chasing leading edge platforms. Biggest benefits likely to come from implementing/leveraging core HR platforms.

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## Key Takeaways Cont.



It's more important than ever to develop & manage your HR automation strategy!



If you don't have one, what are you waiting for? Your competitors are passing you by quickly!



Manage your strategy. With the pace of technological change, you should revisit & course correct your strategy every 6 months at the minimum.

## Our Technology Journey

## Our Technology Journey

### Step 1: Digitized HR Records

- Employee personnel records
- Policy documents
- Program & benefit documents

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## Our Technology Journey

### Step 2: Implemented Use of Process Automation Technologies

- Onboarding/Departure
- Performance Management
- Employee Surveying
- Compliance Management

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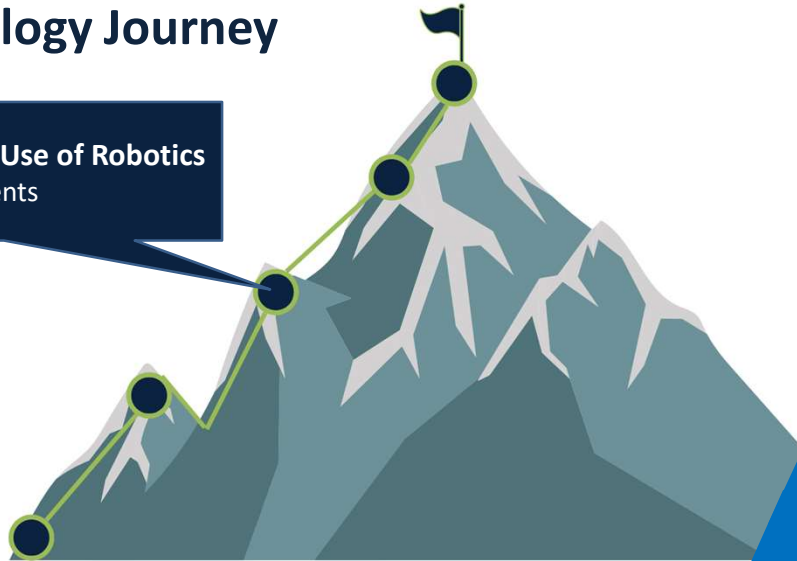


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## Our Technology Journey

### Step 3: Implemented Use of Robotics

- RPA for Assessments



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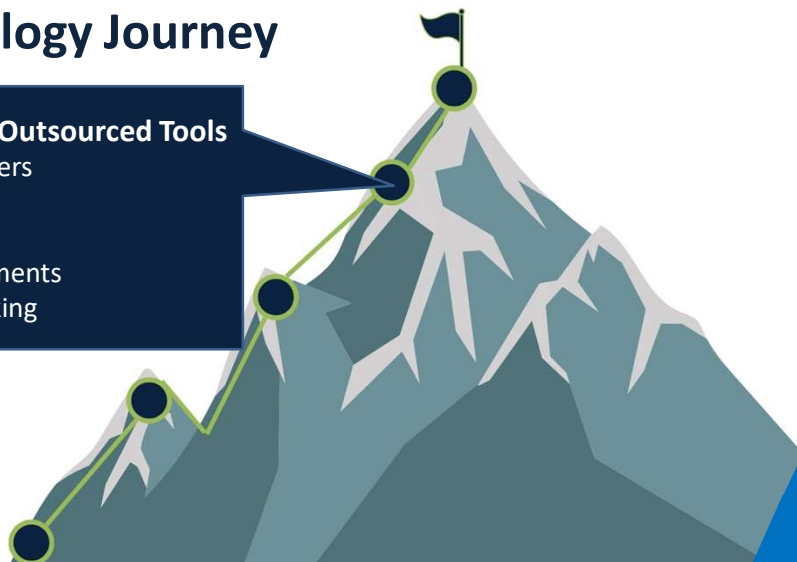


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## Our Technology Journey

### Step 4: Integration of Outsourced Tools

- HRIS to Benefit Providers
- ATS to:
  - Video Interviews
  - Candidate Assessments
  - Background Checking



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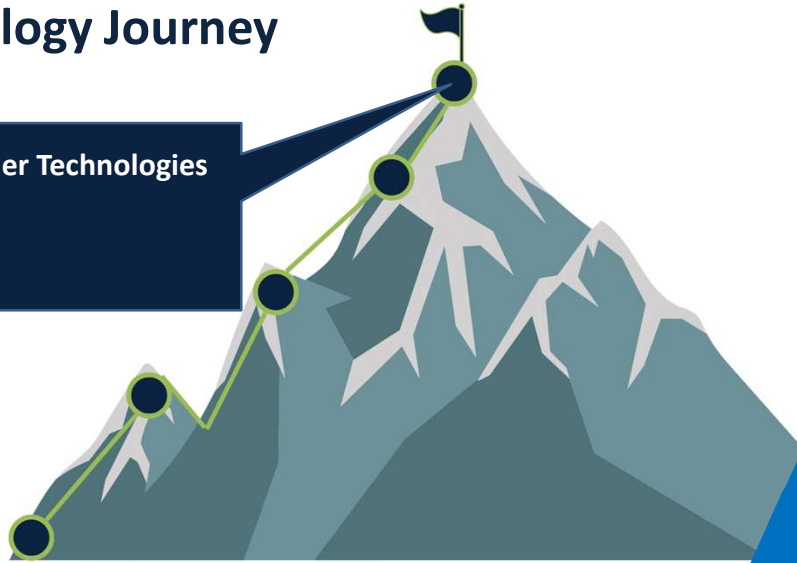


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## Our Technology Journey

### Step 5: Exploring Other Technologies

- Video Technology
- AI Robotics
- AI ChatGPT



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## Focus on the Biggest Value



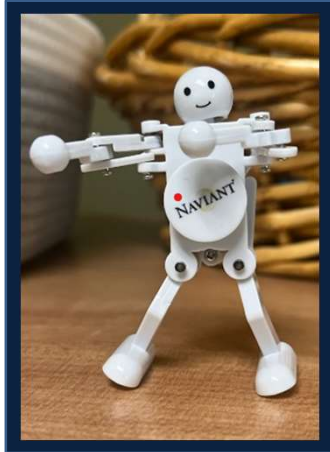
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## How to Remember?



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