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HRIZONS HELPS RIGHT THE SHIP FOR CALGARY-BASED ENERGY COMPANY

Case Study: Post-Implementation Optimization to Drive Better Use and Adoption

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This Calgary-based, North American environmental and energy services company supports responsible resource development by offering environmentally sound water and waste management solutions to customers. It specializes in services to the oil, gas, and mining industrial sectors. The company currently employs more than 4,000 employees having grown through acquisition and has chosen the SuccessFactors Talent Suite as their integrated talent management (ITM) platform.

PROJECT OVERVIEW

The client was experiencing a number of challenges with their implementation of the SuccessFactors platform. Their challenges included low adoption, half-supported processes, unnecessary administrative burden and overly complex processes.

HRZ®EVOLUTION Optimization Services were deployed as a two-phased project: optimizing the ITM processes and reconfiguring the SuccessFactors talent management suite accordingly. The key ITM processes to consider were recruitment, goal and performance management, and learning management with additional process analysis of compensation and succession planning.

The goal of the project was to conduct an in-depth analysis of the current issues, desired future state, and optimal SuccessFactors configuration (Phase I) and then to implement the recommendations based on the initial analysis (Phase II). Phase I took approximately five weeks to complete and centered on an ITM Optimization Workshop that included a SWOT analysis as well as process-improvement consulting to optimize the company's ITM solution. The workshop analyzed account business priorities, the current maturity level of the organization, and the latest enhancements and product roadmap of the SuccessFactors suite.

The workshop was preceded by an initial assessment and a review of current state design and configuration decisions. A follow-up report to the project team and executive sponsors included the set of recommendations for solution optimization. Recruitment, goal management, and performance management were our areas of primary focus.

- **Recruitment** – *The recruitment optimization goals were to streamline the recruitment process, improve the user experience for candidates, recruiters, and line managers, and enable effective reporting on key recruitment performance indicators such as time, cost, and quality of hires.*

- **Goal Management** - *Goal management optimization focused on simplifying and streamlining the process, improving user adoption levels and experience, and placing greater importance on goal quality and alignment of performance on organizational objectives.*

- **Performance Management** – *Optimization goals included driving better alignment of goal setting within the performance management process; improving the user experience and finding more process efficiencies for managers, employees, and HR.*

- **Learning and Compensation Management** – *Recommendations for process and configuration changes for learning management and compensation were also provided. Plans to implement these changes will occur in 2015.*

The HRIZONS consulting approach utilizes a Variable Implementation Methodology that takes into account the maturity level of the organization and the level of process and technology change that the organization is prepared to manage.

Our focus with this client was on an implementation strategy that would support incremental change and which took into account the many other business priorities that were occurring during the ITM project. Processes such as recruitment and goal management were fully automated and implemented, while processes for learning management were configured in anticipation of new learning initiatives in 2015. Process improvements for compensation were implemented at the preautomation level in anticipation of full automation in 2015-2016. The recommendations from Phase I were accepted, and in Phase II the solutions for recruitment, goal and performance management, learning management, and integrations with the organization's HRIS systems were all successfully implemented within a six-month timeframe.
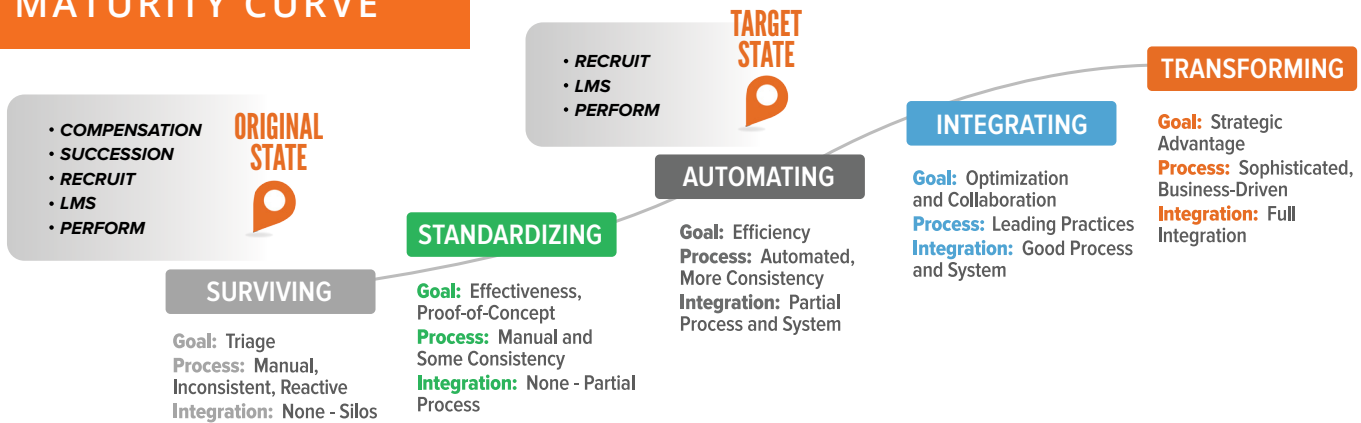
PROJECT CHALLENGES

In spite of using a world-class HCM platform, the initial implementation had not fully taken into account best practices with regards to process and technology configuration, which became one of the main challenges of the project. These challenges were leading to sub-optimal solution design and poor user adoption of systems and processes throughout the organization. Additionally, performance management and goal management were being treated as elective processes with less than 25 per cent user participation. Recruitment configurations were not well matched with desired processes, and learning management saw only limited use.

An initial configuration of the employee development module had been previously completed but employee development was still being managed through a manual process. This situation required more than the standard audit process to assess the current effectiveness of ITM processes and configuration. HRIZONS was brought in to perform the ITM Optimization effort to ensure that best practices were identified at both the process and technology level.

Consideration of the ITM maturity level of the organization was critical in determining what changes could be accepted by the organization and lead to high levels of user adoption. In terms of their ITM maturity curve, most of the company's talent management processes were at the "Surviving" level – highly siloed with little or no integration of functions, and using manual processes that were often inconsistent and reactive to immediate pressures.

The resulting goal was to move recruitment, LMS, and performance management processes to the "Automating" level by 2014, with plans to also bring compensation, succession planning, and employee development planning to the same level by 2015.

MATURITY CURVE

ORIGINAL STATE
- COMPENSATION
- SUCCESSION
- RECRUIT
- LMS
- PERFORM

TARGET STATE
- RECRUIT
- LMS
- PERFORM

SURVIVING
Goal: Triage
Process: Manual, Inconsistent, Reactive
Integration: None - Silos

STANDARDIZING
Goal: Effectiveness, Proof-of-Concept
Process: Manual and Some Consistency
Integration: None - Partial Process

AUTOMATING
Goal: Efficiency
Process: Automated, More Consistency
Integration: Partial Process and System

INTEGRATING
Goal: Optimization and Collaboration
Process: Leading Practices
Integration: Good Process and System

TRANSFORMING
Goal: Strategic Advantage
Process: Sophisticated, Business-Driven
Integration: Full Integration

SOLUTION DESIGN

The ITM Optimization Workshop reviewed options and new features for each of the targeted talent management processes. The project team gathered with HRIZONS lead consultants who facilitated analysis and discussion in the areas of recruitment, succession planning, LMS, and goal and performance management. Current state and desired future state analysis of each process area were completed and included recommendations for optimization of processes and technology configuration. Visio software was used to document and map our suggestions for adjusting roles and process workflows. Further recommendations included a project roadmap and estimates for level of effort and costs of all deliverables associated with the implementation of the recommended solution.

Following HRIZONS Variable Implementation Methodology and consideration of the full range of the company's business priorities, the goals of the project were twofold: to support incremental change at this point in time and to position the organization for transformational change of their ITM processes over the next 2-3 years.

Streamlining the route map for requisitions and eliminating rigidity in the processes for filling out requisitions and the approval workflow were identified as areas of focus in the area of recruitment. System rigidities were adversely affecting the hiring manager user experience and increasing resistance to working within the system. A creative configuration solution eliminated several unnecessary steps in creating and approving requisitions, significantly improving the hiring manager user experience.

Managing the transition from recruitment to on-boarding presented a significant challenge. The client was handling this process manually in Excel spreadsheets, which required considerable time and resources to access, enter, and validate the necessary information to support the onboarding process of new hires.

The process was automated within the recruitment module, and greatly reduced the time and level of effort to facilitate the transition to onboarding of new hires.

Another key configuration brought all the jobs subject to Department of Transportation (DOT) regulations online to streamline the candidate application process. Previously, candidates manually completed a potentially 18-page form. The new configuration allowed for the online completion of a much streamlined form. Turnover and related hiring runs high in these positions, so a significant pain point was solved in this optimization initiative. In the areas of goal and performance management, a creative configuration solution simplified and streamlined the process such that employees could work with one performance template instead of two and not have to be trained on how to cascade goals (a process change that adds unnecessary complexity to their process). The process change substantially improved the ease of use for employees while still retaining the alignment of corporate performance expectations throughout the year.

RESULTS

Just a few months following the project's completion, immediate impact has been realized in three distinct areas:

- **Recruitment** – *A fully-functioning, standardized recruiting solution was delivered for US and Canada, improving the user experience for both internal and external candidates. The recruiting processes were reconfigured and streamlined for requisition management and candidate application processes, and employee referral and KPI reporting has been fully enabled. The administrative burden of manual processes and an expanded candidate pipeline (via referrals) have been addressed; candidate experience and the company's employment brand saw vast improvement, and key metrics – reduced time and cost to hire, improved quality of hire and greater internal compliance –are all tracking well.*

- **Goals and Performance Management** - *Process efficiencies, user experience, and adoption of the goal management process have all experienced significant gains. The company now has better process integration within the performance management process.*

- **Learning Management** – *LMS data structures and processes were standardized to better develop and deliver course content and to track critical training requirements and certifications.*

The client is now positioned for significant transformation of the ITM processes to support their strategic business objectives. The optimized processes and platform configurations are now in place to support a renewed focus on ITM over the next 2-3 year period.

The solution design and implementation of the ITM processes for recruitment, goal and performance management, and learning management were all implemented on time and within budget. Process improvements for compensation are also in place, providing a foundation for anticipated automation of those processes in 2015-2016. The project sponsor and key stakeholders have expressed confidence that they now have the solution they need for transformational change in this important area of their business.

Key Success Factors

- Level of client engagement in the process
- Client knowledge of the SuccessFactors system and ability to do quick, in-depth testing of configuration changes
- HRIZONS consulting expertise – consultants that knew best practice ITM design and how to optimize the SuccessFactors platform
- HRIZONS consulting experience - consultants had 15+ years of related functional and technology experience, including in-depth expertise with the SuccessFactors platform
- Strong project management on both the client and HRIZONS teams

HRZ®EVOLUTION **is a Managed Services Program providing a range of post-implementation support to clients. It includes advisory, system support and configuration services to enhance administrative excellence and optimization of HCM programs.**

OFFERINGS BY SERVICE LEVEL

	HRZ®EVOLUTION	HRZ®EVOLUTION Plus	HRZ®EVOLUTION Total
On-Demand Consulting and Support	✔	✔	✔
Cycle Preparation		✔	✔
Quarterly Check-Ins		✔	✔
Annual Health Check		✔	✔
System Administration Workshop			✔
Transitional System Administration	optional	optional	optional
Optimization Services	optional	optional	optional

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When I first joined the company I knew I was inheriting a challenging HCM program that needed some attention. The original implementation of SuccessFactors was a one size fits all approach. There was very little process design and little to no engagement with the business. We knew we had to "right the ship" and wanted a partner who specialized in the modules we needed to redesign. HRIZONS came highly recommended as a strong, established boutique consulting and implementation partner of SuccessFactors who could tackle more complex challenges like ours. We were very aligned with their "process first" approach to tackling HCM programs and valued their well-established reputation and track record for success. What we found was consistent with what we heard. HRIZONS provided top tier consultants who delivered more value for less than any of our tier 1 partners.

One thing I appreciated was their consideration of where we were as a company in terms of process maturity and our user readiness levels. We ended up with process designs and configurations that our user community was ready to absorb. Now that we've had an opportunity to see the fruits of our labour we can focus on building greater adoption and moving our talent program further up the maturity curve. Our partnership with HRIZONS has produced some early wins and great positive momentum. We look forward to continuing to build on this success and it's great having HRIZONS to lean on every step of the way."

– Director HR Operations

Experience the HRZ® difference.