

Making the Business Case for Improving your Employee and Manager Experience through HR Technology

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Solutions

WCC Club as our Case Study

Well established Club with Exclusive reputation - Est. 1929

1500 Member families and long waiting List

Family Oriented Club - 600 Members under the age of 16

Two Locations: Main Club and Beach Club

30 Department Managers

350 Core employees - 650 from May through September

HR Team: Director, Benefit Mgr., Recruitment Mgr.
Payroll Supervisor shared with Controller

Our WCC Story - Human Resources Mindset and Mission

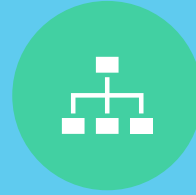


- ▶ Business Leader
- ▶ Partner
- ▶ Advocate
- ▶ Motivator
- ▶ Coach
- ▶ Guide
- ▶ Champion
- ▶ Optimizer

HR Mission within the Organization



**A PHILOSOPHY
OF
EMPOWERMENT**



**EMPOWERING
DEPARTMENT
MANAGERS
WITH BETTER
HR TOOLS AND
STREAMLINED
PROCESSES SO
MORE TIME
CAN BE
DEDICATED TO
RUNNING THE
BUSINESS AND
TAKING CARE
OF MEMBERS**



**HR IS A
BUSINESS
ENABLING
FUNCTION AND
CAN LEAD THE
WAY IN
OPTIMIZING
THE EMPLOYEE
AND
MANAGEMENT
EXPERIENCE,
FROM
ATTRACTING
AND RETAINING
THE BEST
TALENT TO
PROVIDING A
CULTURE OF
CARING FOR
AND SERVICING
ITS TEAM.**



**THE OBVIOUS
CORRELATION -
HAPPY
EMPLOYEES
MAKE HAPPY
MEMBERS AND
CUSTOMERS
AND THAT IS
GOOD
BUSINESS!**

Cultural Engagement Tools

Structured HR Hiring Process with Reference and Background Check

Comprehensive HR Orientation Program including Club Tour

Daily Employee Newsletter

Quarterly Employee Recognition Award Celebration

Online CMAA University LMS

EAP Partnership

ESL and Various Management Workshops

Annual Performance Review and Merit Increases

Annual Wellness Fair, Twice a Year
401K meetings, Two Employee Celebrations

Benefit Advocate through our Benefit partner (outsourced)

Exit Interviews

Organizational Symptoms

- Aging Technology
 - Time-consuming Recruitment Process
- Tedious Application Process - not user friendly
 - Small pool of candidates
 - Long Cycle Time to Hire
 - Limited Employee Self Service
 - No Manager Self Service
 - No automatic Hire / Onboarding Process
 - Many manual processes
- Two support partners: ADI (T&A) and ECI (HR)
- Limited Reporting Functionality and Analytics

Possible Solution:

- Review HR Technology and Embrace additional Technology Features

WCC Business Case for Change

Current State

- Our 2010 HR Technology required major retooling
- Estimated timeline: 3 to 6 months
- Greater Financial Investment
- In critical need of a nimble ATS system, to shorten hiring cycle
- Departmental Schedules were still paper based and not compared to actual
- Many OT calculations with variables required manual calculations
- Complexity and cost of Outsourcing the management of our Benefits to a third party
- Opportunity to disrupt and transform the HR experience

Discovery Stage Take-Aways

Transformational HR requires:

- Looking in and assessing internal weaknesses by speaking to key players and keeping an open mind
- Focusing on continuous improvement while keeping the end customer in mind
- Creating a list of requirements and prioritizing your needs (“need” versus “nice”) to define the scope of your project
- Reaching out to the appropriate technology partners based on your organization’s size



T⁵ I² M³ E¹

F² O³ R⁸

C⁴ H⁶ A² N² G⁴ E¹

Key Stakeholders in this Project



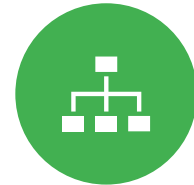
COO and Board



Financial
Controller



HR Team



All Department
Managers



Employees



Partners

Project Scope: Desired Future State

Club HR Vision: HR touches everyone inside and outside the Organization

Optimize Recruitment Platform and Cycle time from Applicant to Hire

Automate the Onboarding - Streamlined and Paperless

Engaging Platform - Branding and Attraction Factor!

Partnership with Job Boards and Key Partners (Hcareers for example)

Better use of Recruiter time (can dedicate more time to training and Employee Relations)

Get rid of Manual Inputs and Risks for errors (Complex PTO rules and Overtime Calculations)

Simpler scheduling process and OT monitoring

User friendly ESS and MSS - Data Access 24/7 and Better and Transparent Management Practices

Eliminate Outsourcing of our Benefits for better Data management and reduce Broker Dependency

What work is
out of scope
for this
project?

FMLA Module

LMS

Performance Management

Pay cards versus Paper Checks

The Extensive RFP Process

Key Steps to a six months process: July 2017 through January 2018.

- ▶ We aligned our internal stakeholders around the value of doing an RFP
- ▶ The Business Case for Change was discussed with our COO and approved by the Board
- ▶ We spoke to several vendors: ECI, Paycom, Ultimate, ADP, Payprocorp, Ceridian, SyncHR
- ▶ We asked every vendor to complete a Criteria Matrix, so we would have an objective way of comparing providers.
- ▶ We invited our internal stakeholders (Finance, Payroll, HR, F&B Director, Beach Club Manager) to the meetings with the finalist, for validation.
- ▶ We Spoke to the CEO of SyncHR and conducted reference checks with current clients
- ▶ We negotiated our final proposal

Conducting Due Diligence

Please refer to your Handouts:

- ▶ HCM Criteria Matrix (WCC 2017-2018)
- ▶ Sample Scorecard shared by SyncHR
- ▶ HCM Purchase Options

Key Factors in our final Vendor Selection



**ADVANCED PAYROLL
FEATURES**
(ADVANCED RETRO PAY,
AUTOMATED BLENDED
OT CALCULATIONS)



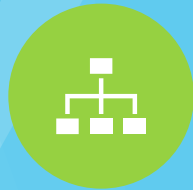
**BENEFIT INTEGRATION
WITH CARRIER FEEDS
(SHORTER
RECONCILIATION CYCLE)**



**LABOR BUDGETING
FEATURES (BUDGET
VERSUS ACTUAL).
NIMBLE
ORGANIZATIONAL
CHARTS WITH TIME
MACHINE**



**STRONG FOCUS ON
CHANGE MANAGEMENT,
COMMUNICATION AND
EDUCATION**



**FOCUS ON EMPLOYEE
AND MANAGER
EXPERIENCE WITH
POWERFUL ESS AND MSS
PORTALS**



**USER-FRIENDLY
APPLICANT TRACKING
SYSTEM**

Due Diligence Stage Take-Aways

Transformational HR requires:

- Take notes during vendor demos
- Use objective criteria to compare vendors
- Ask all the questions you can think of upfront and then more!
- Inquire about Sandbox opportunities
- Speak to your implementation specialist and service team specialist before making a decision
- Validate your final decision with key internal stakeholders
- Ask to speak to the CEO
- Conduct thorough reference checks
- Ensure a good cultural fit

SyncHR Video

- ▶ <https://www.synchr.com/resources/synchr-product-overview-video>

Our Story: The Implementation Steps and Change Management Process



Kick off with a number of Management Meetings



3 cycles of data pulling and “cleaning” before transferring over the data



We changed our Payroll Cycle to optimize scheduling and OT management



We changed our PTO rules to accrue weekly



We required our employees to clock in and out for meal periods



We ran our first Payroll on April 1st 2018 with new Biometric Clocks



We closed our Benefit Outsourcing Agreement before launching Open Enrollment 2019

Timeline - January 2018 - February 2019

We optimized our Organizational Mapping, aligned it with GL codes, and worked on the configuration of our Pay groups and PTO rules

We customized and launched our ATS

We worked on customizing our Time and Attendance module and decided to postpone Scheduling

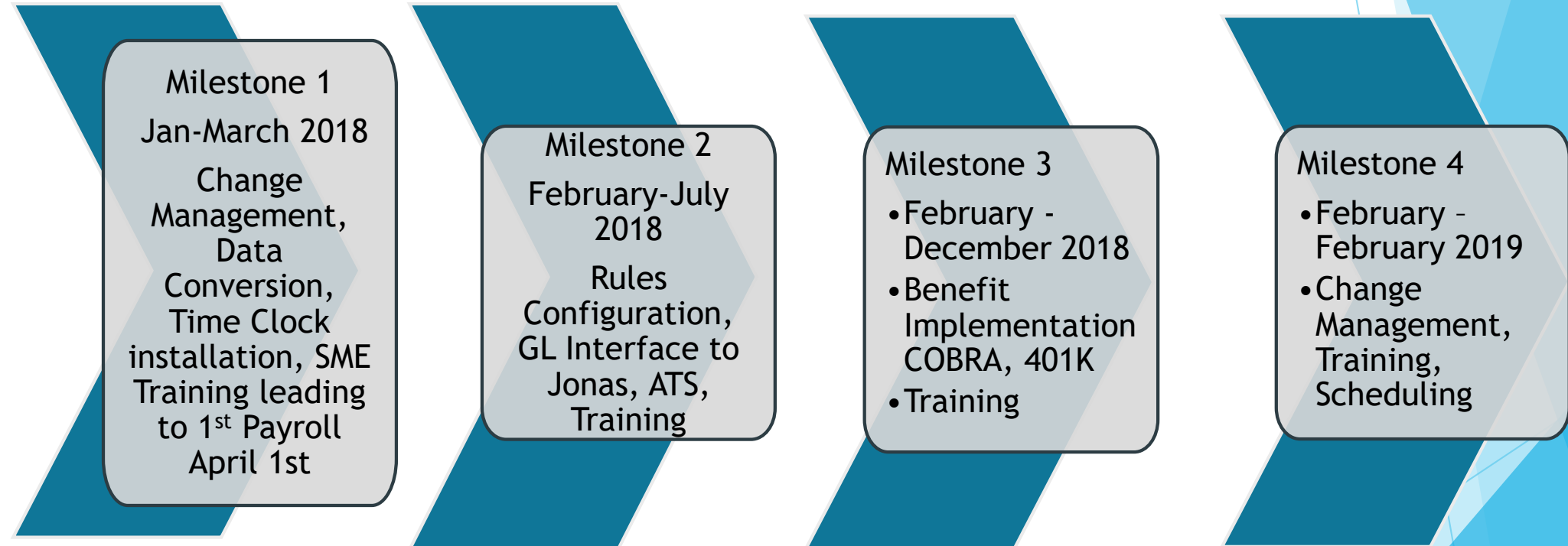
We onboarded massively in May and June

We worked on setting up our Benefit feeds Summer through Fall

We launched our Scheduling module last

We communicated, educated and trained our team before, during and after implementation

Project Schedule and Key Milestones



The Many Benefits of the Change and next steps

A fully redesigned experienced focused Hiring and Onboarding process

A Strong Pipeline of Applicants

New Hire Orientation Program added value and focus on building the Culture

Better Payroll Controls

A faster, accurate and error free Benefit Management Process with direct feeds

Empowered Employees and Managers with access to secure records

Advanced Scheduling features to leverage

Data Analytics accessible via Ad-Hoc and Customized Reports

Project Implementation Stage Take-Aways

- ▶ Change Management is 90% of your recipe for a successful implementation. Assess your organization's change readiness and plan accordingly!
- ▶ Give yourself a reasonable timeline to be successful and take the time to plan ahead (working on internal processes, rules and configuration)
- ▶ Determine level of Centralization versus Decentralization of responsibilities and decide what makes most sense prior to the implementation
- ▶ Plan your project implementation during your off-Peak Season, this may mean conducting your RFP when in full Season.
- ▶ Spend time upfront discussing Process Flow and calibrating and configuring with your vendor, so as to avoid change orders and rework during implementation. Sandbox environment is great!
- ▶ Be prepared to manage unforeseen obstacles or consequences in a positive and proactive manner and communicate, communicate, communicate!
- ▶ Involvement of Key Stakeholders and Leadership throughout the project is key to Success
- ▶ Celebrate Key Milestones and Successes!

Key StakeHolder Feedback

July 2019 - A year later

All functionality is in place with a strong adoption rate - ESS and MSS

New Hires need to be trained on the new technology, an ongoing process

5300 applicants in the system as of July 31st

Full financial impact has not been measured yet

Enhanced process efficiencies

Opportunity to leverage the reporting function and Dashboards

Thank you for your time and let's connect

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Empowering people to be and do great work while living in the present moment

EquaMagna is a Boutique Human Resources Solutions Consultancy providing Strategic Human Resources, Talent Acquisition, Performance Management, Benefits and Compensation, Individual and Team Coaching, Training and Development, HRIS/HCM Implementation and Optimization and Workplace Wellness.