



# A Quick Guide to Employee Self Service Success



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# Introduction

An Employee Self Service (ESS) system has become a non-negotiable tool for HR departments in rapidly growing small to medium-sized businesses and large established organisations. As a provider of a cloud-based, all-in-one workforce management platform with an inbuilt ESS, we understand the ins and outs of ESS systems, the benefits they offer, and the challenges they present. That's how we know that simply purchasing and installing one is not enough to guarantee its success in delivering the resource efficiencies you are aiming for.

There are so many ways you can influence the success of an ESS, so to set you on the right path we've pooled our knowledge to bring you this quick guide packed with useful tips and information.

# What is an ESS system?

It's a secure, online portal that allows employees to take care of many administrative tasks that are typically undertaken by HR staff. These include:

- Updating their contact details
- Updating their emergency contact details and medical information
- Entering and amending banking and tax information for payroll
- Creating and submitting leave and unavailability requests
- Viewing their roster
- Submitting timesheets
- Receiving and viewing payslips
- Uploading important documents like doctor's certificates, qualifications and certificates.
- Uploading and submitting receipts and expense claims
- Corresponding directly with their supervisor or a member of the HR department
- Viewing the devices or equipment assigned to them

Some ESS systems available also provide the functionality to send SMS, push notifications and emails to employees; facilitate the onboarding process; run surveys and polls; provide access to e-learning and host document libraries.

# What are the benefits of ESS?

The core benefits of ESS are greater efficiency in HR processes, cost savings and greater data accuracy. However, these can be broken down into more tangible and specific benefits for both HR departments, managers and employees.

## For HR & Managers

- Saves time entering and updating employee contact and payroll details
- Saves time distributing paper payslips to employees
- Offers convenient access to employee contact information, rosters and leave information
- Reduces process lead times for tasks such as leave approvals and expense claims
- Provides audit trails of all leave and unavailability applications
- Entry errors are avoided by allowing employees to enter data themselves
- Promotes consistency in internal processes
- Reduces absenteeism and confusion over rostered shifts
- Improves the accuracy of data for reporting and auditing purposes

## For Employees

- Empowers employees to manage their personal, banking and tax details
- Empowers employees to take responsibility for leave and unavailability requests
- ESS mobile apps provide employees with round-the-clock access to rosters so they never miss a shift
- Promotes feelings of security, autonomy and belonging to the organisation

# What are the challenges of ESS?

There are several challenges that employers need to be aware of, and in some cases overcome, to be able to realise the full potential – and in turn, the benefits – that an ESS system can offer.

## - Getting employees to embrace and adopt the new system

You may have purchased the best ESS system available, however if your employees aren't convinced it's going to make their lives better they are unlikely to use it to its full potential. This challenge is particularly pertinent to employees who aren't comfortable with digital technology and mobile apps.

## - Integrating with existing HRM systems

If you have purchased a stand-alone ESS that isn't part of an all-in-one workforce management system you may face difficulties ensuring a tight integration with your HRM, HRIS and payroll systems. Without tight integrations, the efficiency gains that come from reduced data entry and information re-keying will be lost.

## - Establishing new processes and letting go of old ones

Implementing an ESS means automating some processes and changing others. Some employees may be hesitant, or even resistant, to change and may struggle with the transition. This means that it's time to audit all relevant processes, decide what works and what doesn't, and investigate how you can reflect those that work in the ESS.

## - Installation process

The installation period needs to be managed carefully to minimise disruption to business as usual tasks. While a phased roll-out may work in some instances, the longer this takes the more frustration and potential resistance to the new system you will face.

## - Training

Often training can be conducted online or in groups, but this can be difficult to coordinate if you operate across multiple sites, or with a shift-based workforce who may or may not have access to the right devices.

## - Information gaps

Gaps in information can occur in two ways:

1. If staff don't use all features correctly and do not take responsibility for ensuring their information is complete and up to date.
2. If the migration of data from the old system to the new is not completed correctly.

# Tips for ESS success

As outlined in the challenges section, running a successful ESS system is not necessarily a simple plug and play process.

Thankfully, there are things you can do to maximise your chances of successful implementation, adoption and use of your new ESS system.

First things first...success starts with selecting the right ESS system for your business.

## Selection

- Research and thoroughly understand the challenges presented by the current system. You'll have a far higher chance of success if the new system addresses these challenges, rather than simply automating existing processes that don't work.
- Consider which platforms you already have that the ESS needs to integrate with and research products that offer you a tight, seamless integration. Better yet, consider moving as many systems as you can over to an all-in-one platform such as Roubler. These platforms remove the need for APIs and feed information from the ESS portal into a central database which payroll, T&A and rostering all draw from. If recruiting and onboarding are available through your system and directly tie in to the self-service portal, entry errors regarding employee details can be prevented as early as the application phase by eliminating data re-entry.

- Ensure the system you choose can be used via mobile app on iOS and Android so that access is convenient and personal. This is particularly important for shift-based workers who may need access to their information outside standard business hours.
- Ensure the ESS system you choose is simple enough to use for the least-technologically minded person you employ. Unless all employees can understand how to use it quickly and easily, you'll face significant challenges in ensuring full adoption of the software.

For more tips on selecting the right system, download our ebook: *The HR Manager's Complete Guide to Purchasing HR Software* from [www.roubler.com/ebooks-guides/selecting-hr-software/](http://www.roubler.com/ebooks-guides/selecting-hr-software/)

## Implementation

- Start communicating early. As soon as the dotted line is signed, begin communicating to all employees to prepare them for the new system. Provide them with information about what the new system will require them to do, how they will access it and when it will go live.
- Time the installation and data migration period well. Avoid periods of time where you know staff will be particularly busy or on holidays (e.g. summer and Christmas). Have a defined period to complete the installation and migration and do everything you can to stick to it.



- To maintain the security of the system you may wish to consider which employee profile information you are going to make available for employees to update. Some ESS systems automatically prevent employees from changing key identification information such as names and dates of birth and require changes to be approved only on sight of official documents such as a marriage certificate or driver's licence.
- Train staff thoroughly and as early as possible. Employees should be well equipped to start using the system and all features it offers as soon as it goes live. Early training can also help alleviate any concerns about new processes and will get employees excited about the change.
- Keep it simple. Don't enable features you don't think you'll need or use to begin with – this will cause confusion.
- Make it look like you. Assuming you've taken heed of the final tip in the selection phase, you should have a simple, visually pleasing system. However, it makes a huge difference to employee adoption if you can white label the product with your company logo and branding.

## Use and adoption

- Have a strict cut-off date for the use of old systems. Make it mandatory to use ESS and no other systems. Using old and new systems together causes undue confusion and negates any time efficiency benefits that ESS can deliver.
- Offer access to the ESS from the onboarding stage. This will drastically speed up your onboarding process and employees can engage with you before they step through the door on their first day.
- Ensure staff who aren't desk-bound with a computer or who may not have their mobile phones with them at work can access ESS via a kiosk located in their workplace.
- Keep communicating. Send out regular updates with tips for getting the most out of the ESS, remind people to keep their details updated, and offer support and links to training resources.
- Offer a single point of contact for questions and technical support. This will streamline issue resolution and reduce potential confusion and frustration from users.

For more tips on how to help your employees make the transition to new software, download our *Guide to helping employees adopt new HR technology* from [www.roubler.com/au/ebooks-guides/help-employees-adopt-new-technology/](http://www.roubler.com/au/ebooks-guides/help-employees-adopt-new-technology/)

# How do you know if your ESS system is successful?

Anecdotal evidence and user feedback are vital ways to assess the success of your new ESS system. However, for a full picture it's necessary to set some metrics in place to measure at regular intervals.

Set metrics and take a baseline measurement before implementation of the new system, then in three, six and twelve months' time.

## Measure of success include:

- **HR administration time**

How much time are your HR team and managers spending on administrative activities that the ESS system will soon handle? If the new system is successful, this time should be greatly reduced.

- **Information requests to HR**

How many people make requests each month to HR for information relating to payroll, leave and rostering, or request changes to information on their employee profile? A great measure of success is if the number of these requests significantly decreases.

- **Improved data quality**

This can be measured by looking at the number of payroll and reporting inaccuracies you currently experience and comparing them to those that occur post-implementation.

- **Improved employee engagement and morale**

You may wish to include questions in your employee satisfaction surveys regarding access to HR services and HR processes. The results should give you an indication of how well employees have adopted the new system.

- **Processing times for key activities**

Processing times for activities such as submitting and approving leave and unavailability requests or expense claims should decrease with the successful implementation of an ESS system.

# About Roubler

Welcome to the future of workforce management. Our all-in-one HR and Payroll software consolidates multiple workforce management functions into one easy to use, cloud-based system.

All Roubler features are connected by a single data source enabling you to manage employee information and HR tasks across the entire employee lifecycle on one platform.

With an inbuilt Employee Self Service function available on iOS and Android, the information you need to onboard employees, create rosters, manage leave and run payroll is always up to date and ready to access wherever and whenever you need it.

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*“The biggest thing is how much time it has freed up for me, where staff can onboard themselves and create their own unavailability which allows me to get out there and manage the business”*

– Matt, Retail Store Manager, HG Retail

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*“The payroll is quick, accurate, and award-compliant without me being involved. The staff and management have engaged with Roubler really quickly.”*

– Chris Jolliffe, General Manager & Licensee, Potts Point Hotel

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