



How Design Thinking Can Improve the Success of your Employee Portal

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How Design Thinking Can Improve the Success of your Employee Portal



A successful Employee Portal is designed with the end-user in mind. Developing an understanding of the employee end-user, and applying that understanding in the context of design thinking can dramatically increase the portal's success.

This white paper will explore the disciplines of design thinking, and apply them to the initial design and on-going improvement of an HR self-service portal. Throughout the paper, we'll provide examples of two well-known organizations that applied these practices to see positive results.

An employee self-service portal is not a once-and-done endeavor.

The use of design thinking presents the opportunity to:

1. *Launch a self-service portal that's widely accepted by the employee population.*
2. *Effectively improve the portal over time.*

The Objectives of the Employee Self-service Portal



The primary objectives of the employee self-service portal are two-fold. The Portal gives employees direct access to HR knowledge base content, digital forms and other job-related information. It also gives employees the convenient capability to submit requests, and initiate HR transactions on-line, usually from any device.

While the Portal delivers experiential advantages to the employee, it delivers business value to HR operations. According to the research report *“Leveraging the value of Employee Self-Service Portals”* by the Society of Human Resource Management, the portal can reduce HR’s tactical duties and free up time for more strategic

pursuits, with realized cost savings in time and efficiency. User-friendly and paperless, ESS portals can also help standardize processes, reducing errors and enhancing reporting capabilities.”

While these objectives are widely known and agreed upon, there is great variability in the actual success of the portal, from one organization to another. This paper proposes a method to increase the likelihood of self-service success, by applying the principals of design thinking.

What Exactly is Design Thinking?

A 2015 article in the Harvard Business Review, Design Thinking Comes of Age, defines design thinking in the following manner: *“People need their interactions with technologies and other complex systems to be simple, intuitive, and pleasurable. A set of principles collectively known as design thinking is the best tool we have for creating those kinds of interactions.”*

A 2016 article by Deloitte University Press, Design thinking - Crafting the employee experience states:

“Design thinking takes aim at the heart of unnecessary workplace complexity by putting the employee experience first”.

The business value of an HR Self Service Portal tends to increase according to its level of use – the more the portal is used, the more value the portal delivers. Therefore, anything that can be done to make the portal more usable from the employee’s perspective, the more business value the portal will deliver.

According to Deloitte and HBR, the tenets of usability are ease, simplicity, intuitiveness, and pleasure. Pleasure

means that the employee gains a sense of satisfaction from accomplishing a task with ease. The easier or simpler it is to use, the more intuitive it is, and the more pleasure employees derive from using the portal, the greater the value of the portal to the employees, HR and the organization as a whole.

According to Jon Kolko’s article in the Harvard Business Review, the key steps to design thinking include:

- *Focus on users’ experiences, especially their emotional ones.*
- *Use prototypes to explore potential solutions.*
- *Tolerate Failure*
- *Exhibit Thoughtful Restraint*

Let’s examine these individually, and include examples of some actual HR Service practitioners.

The Importance of the Employee Experience

All the literature cited so far emphasizes the role of the employee experience in a theoretical context. While it makes clear the importance of the employee experience, seeing it emphasized in practice has a way of driving the point home.

For example, according to her LinkedIn profile, the CHRO at a major software company holds the official title of “Chief Employee Experience Officer.”

Jacob Morgan, Forbes, Why The Future of Work Is All About the Employee Experience, had this to say:

“Decades ago nobody cared about the employee experience because all of the power was in the hands of employers.”

Today, much of that power has shifted into the hands of employees.

Organizations have always assumed that they can create a place where they assumed people needed to work, but are now realizing that they must create a place where people want to work.

The technology environment is one of the three components that comprise The Employee Experience.

The others are organizational culture, and the physical environment of the workplace.

The technological environment is the tools an employee needs to do their job, including the user interface, mobile devices, and desktop computers. It's this component of the employee experience on which we're focusing when we talk about the Employee Portal.

Another key point about the employee experience, is that it's a foundational component of a higher prize, employee engagement.

The value of employee engagement is well known, from the bottom line business value it delivers, according to Gallup Studies and countless other sources.

But the key point here is that you can't attain high levels of employee engagement without first delivering a superior employee experience.

Tools for Understanding the Employee Experience

Focusing on the user experience sounds simple enough, but like any endeavor, using the right tools can make all the difference. In 2012, Kerry Bodine and Harley Manning of Forrester Research published *Outside-In, The Power of Putting Customers at the Center of your Business*.

Outside-In has become an authoritative source for understanding and improving the customer experience. The tools and techniques they present can be useful in designing the user experience at the start of your self-service initiative.

Surveys

Solicit feedback from employees about their experiences with the existing intranet or portal, via surveys or interviews. One global pharmaceutical company does this on a quarterly basis, to continually improve their portal.

They provide an “Anytime Feedback” button on the home page of the portal. The button links to a survey that elicits information from the employees about their current likes and dislikes about the portal.

The survey also includes open-ended questions about how to improve its ease and usefulness of the portal, from the employees’ perspective. The survey responses are analyzed on a quarterly basis, with the research findings being used to design incremental improvements.

Observational Research



Another technique is to conduct observational research studies of the employees as they're using the portal – typically during a design stage. The *Mayo Clinic* uses observational research at many stages throughout their portal design process. They begin with wireframe designs, and get feedback from the employees.

According to Gianna Pfister-Lapin, a senior user interface designer at Mayo,

“This serves as a very fast litmus test as to which design to continue to refine.”

Throughout the prototyping phase, there are other observational research tools that Mayo uses to home in on the optimal design.

These include the use of software applications that generate heat maps, and provide other feedback based on where and when the user clicked on a screen.

Mayo has also installed kiosks in the company cafeteria, where employees could be observed testing a portal prototype.

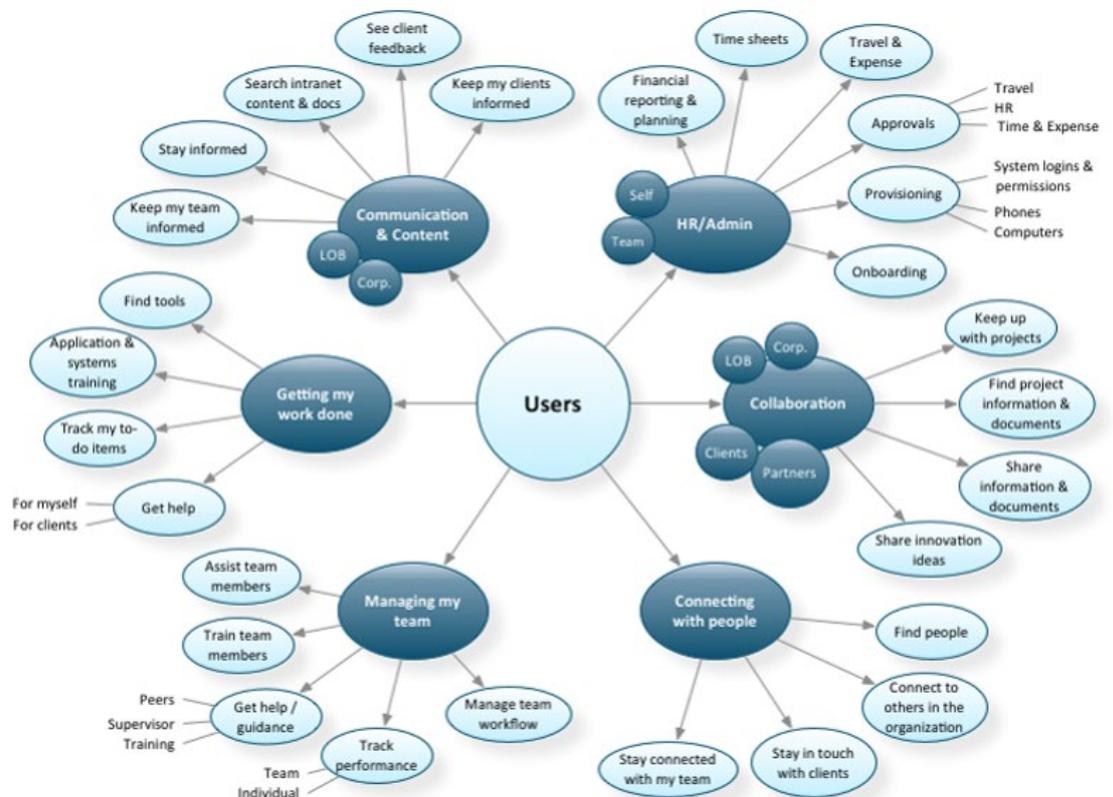
Use of Employee Personas

Organizations are starting to use employee personas to understand the unique needs of distinct employee segments.

In 2016 report by Gartner, Recipe for Digital Workplace Execution: Transform the Employee Experience, the BNY Mellon digital workplace program is cited in its use of personas to improve their 50,000 employees' experience of technology.

The team took a client-centric focus to understanding and improving the internal employee experience. It developed a series of employee personas, such as knowledge sharer, knowledge seeker and inside expert.

The personas were ranked on a number of attributes, such as technology adoption, mobile use, content creation, consumption and sharing, as well as organization knowledge.



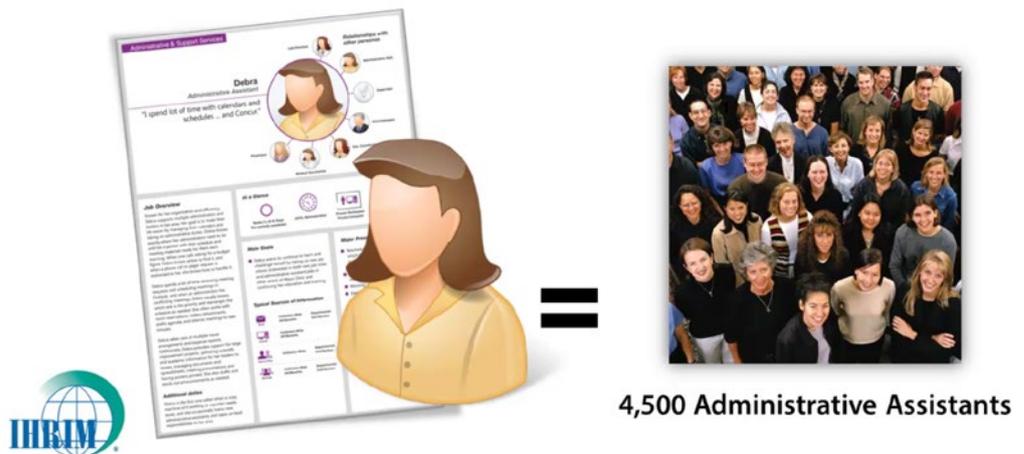
BNY Mellon Combined User Needs Map, courtesy of Gartner, 2016

The result of the research was a comprehensive user needs map, as well as measures of success.

Mayo Clinic applied an extensive use of employee personas into their portal design. Mayo had previously developed a library of 43 employee-focused user

personas, to include every employee type from nurses to students to janitors to lab technicians, physicians and research coordinators. That list was narrowed down to five core personas, based in part of traffic data on their previous employee website.

A persona describes a group of people.



Courtesy of IHRIM and The Mayo Clinic

Applying Prototyping to the Employee Portal

Prototyping is the process of deploying an early model of a feature or solution, in order to get feedback. A prototype is not intended to be the final solution, but rather enough functionality for end-users to utilize, and provide feedback. Some prototypes fail, and because they fail, and fail early, prototypes can be lifesavers, preventing the waste of resources in creating a final solution that users ultimately reject.

Creating a prototype is not an elaborate process. It can be as simple as a storyboard, poster, or a proposed screenshot on a PowerPoint slide. Prototypes are quick and inexpensive. They are not designed to look pretty as much as they are designed to communicate an idea for addressing the needs of users.

The most important goal of rapid prototyping is to get feedback from the ultimate users of a product, service, experience or system. It is the feedback from these users that will generate data necessary to find the “right” solution.

Prototyping offers the following advantages:

- *Quickly and productively initiate a conversation with the ultimate end-users around a concrete idea to generate specific feedback*

- *To test possibilities without becoming committed to a single solution*
- *To learn from iterations without investing too much time, money or other resources*
- *To develop an ultimate solution that will have end-user buy-in*

Innovation expert Michael Schrage says:

“Prototyping is probably the single most pragmatic behavior the innovative firm can practice.”

Once again, we can turn to the Mayo Clinic to understand how prototyping can be effectively used to create a successful employee self-service portal.

During the presentation titled Bringing the End User to the Table: The Mayo HR Portal Project, given at the 2015 IHRIM Annual Conference in Atlanta, GA, Gianna Pfister-LaPin explains how prototyping served as the foundation for their employee portal design.

Pfister-LaPin described their use of Lean User Experience (UX) methodology during the initial design phase. The objective of “Lean” is to eliminate anything that according to the end user, doesn’t add value.

And along the way, it's critical to balance the employee needs with those of the business (HR).

What makes it a lean workflow is the fact that they don't design a whole lot in the first iteration.

According to Pfister-LaPin, "We design just enough so that we can effectively test our designs. We walk around with the wireframe designs, and get feedback from the employees. This serves as a very fast litmus test as to which design to continue to refine." The feedback is then incorporate into a new iteration that's presented for more

feedback, and refined again.

After a series of these iterative cycles, a programmer creates and attaches a small data base, so that the employees can test this new prototype within a browser.

Each time, they get a little more feedback. The design subsequently gets a little more polished and testing shows the issues have been resolved. Confident that they have a prototype that meets the needs of the businesses and the end users, Mayo is ready to begin the formal development stage.

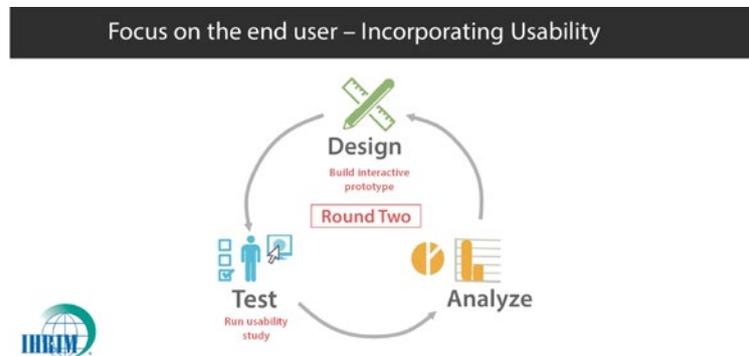


Figure 3: Courtesy of IHRIM and The Mayo Clinic

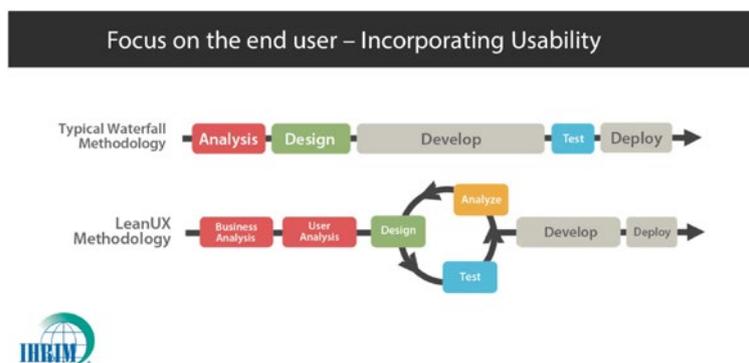


Figure 4: Courtesy of IHRIM and The Mayo Clinic

The Value of Controlled Failure

“Embrace failure. Failure is data.”

Tim Brown, CEO, IDEO

Failure elicits feedback, and feedback fuels improvement. The more you fail, the more feedback you’ll collect, and the additional feedback positions you for greater improvement.

To keep the idea of failure in perspective, the ultimate objective is not to fail, but to deliver a solution that will be embraced and useful to the end-users. Multiple fast failures help you to get there.

The point is not to try and deliver the successful solution in one or two iterations, but in multiple iterations. Each iteration is technically a “failure” because it doesn’t definitively solve the problem. But neither the designer nor the end-user expected it to; you merely expected it to get you closer to the final solution.

This “controlled failure” approach is at the heart of the iterative process described in the previous section. Producing a series of partial, incomplete solutions, and eliciting feedback, then incorporating that feedback into the subsequent “incomplete solution” brings the design closer to where you ultimately want it to be.

The essence of this “controlled failure” approach is that you intend to fail at delivering the final solution. But you also intend make purposeful, incremental gains toward what will ultimately be a better final solution.

“It seems logical when you think about it, but it’s amazing how time and time again, the things we assume to be correct turn out to be wrong when it comes to the user experience. That’s why it’s so important to test and re-test, to iteratively design so you can finally get it right.”

Gianna Pfister-Lapin, a senior user interface designer, Mayo Clinic

Thoughtful Restraint, and Why Less Really is More

Antoine de Saint-Exupéry, a French writer and aviator said,

“Perfection is achieved not when there is nothing more to add, but when there is nothing left to take away.”

Search engines used to look like the Yahoo homepage below, and then Google removed every feature they could, essentially leaving just the search bar. This is the epitome of simplicity of portal home pages.

But less features doesn't mean less capabilities; it's just that you want the features to be revealed as the users

get more involved with the product. You want the feature revealed as and when the user needs them.

In other words, don't attempt to make all the features within the solution visible from the home page.

Greet the user with a clean, simple home page to trigger the easy and pleasant emotions that are at the core of a great user experience. And as the users purposefully navigate to other pages, you can expose more features, relevant to those pages.



Summary



An employee self-service portal is perhaps the most effective lever for delivering the business results of cost reduction and employee engagement sought through an HR Shared Services model. Design thinking is a methodology, that when applied with rigor, will guide you in designing a portal that will deliver those business results.

Begin by focusing on the employees' experience, especially their emotional ones. Involve the employees in the evaluation of prototypes. Create multiple, successive prototypes based on employee feedback, throughout an iterative process.

Don't try to build a successful solution too soon. Instead, through the iterative process, deliver "purposely partial solutions" and elicit user feedback. Rather than to fear "missing the mark," tolerate failure, learn from the feedback and continue the iterative process.

Finally, focus on simple and sparse. Don't overload the homepage with features. Instead, expose additional features on secondary pages, where they'll be more relevant within the user's journey. Because in the end, it's all about the user.

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