



Best Practices for Deploying PeopleSoft Portal and Self-Service

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Wednesday, April 16, 2008









- Mnowledge Infusion: HCM as a Strategy
 - ² HCM StrategyMap™ Methodology
 - eHR Service Delivery Model
 - Best Practices in Direct Access
 - Best Practices in Portals
 - Thanks & Wrap Up







Total Employees	Approximately 50, Across North America
Target Markets	Fortune 2000, Mid-market, Public Sector
Areas of Expertise	HCM and talent management, portals and self-service, performance, succession, recruitment, learning & development, workforce planning, analytics





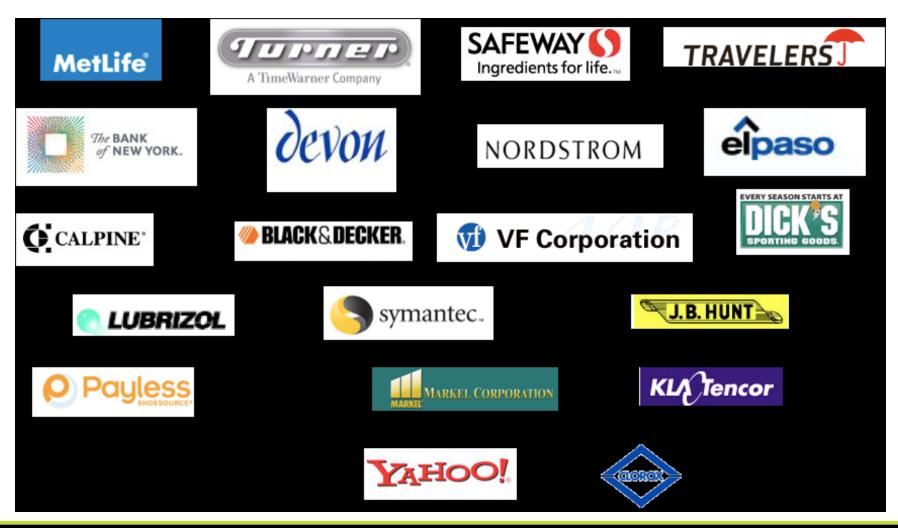
Knowledge Infusion Methodology







Fortune 500 Clients







What's Wrong With Today's Model?



What Does it Look Like?



Disconnected Information

- No connection between the valuable data locked in disparate systems
- Critical relationships between people and data unavailable

Disconnected Users

- Access is difficult for partners; access alone is NOT enough
- Sub-site creation and management is a struggle

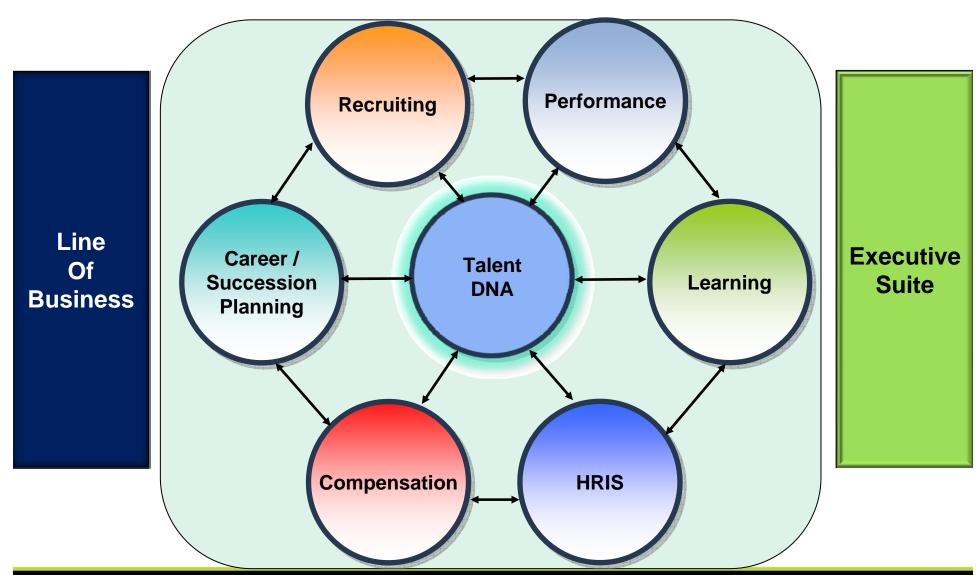
Aggregation Mindset

- Multiple Systems, Access points, and Interfaces (You can't train everyone in all systems)
- Interactions are not optimized around a business process



Integrated Business Processes







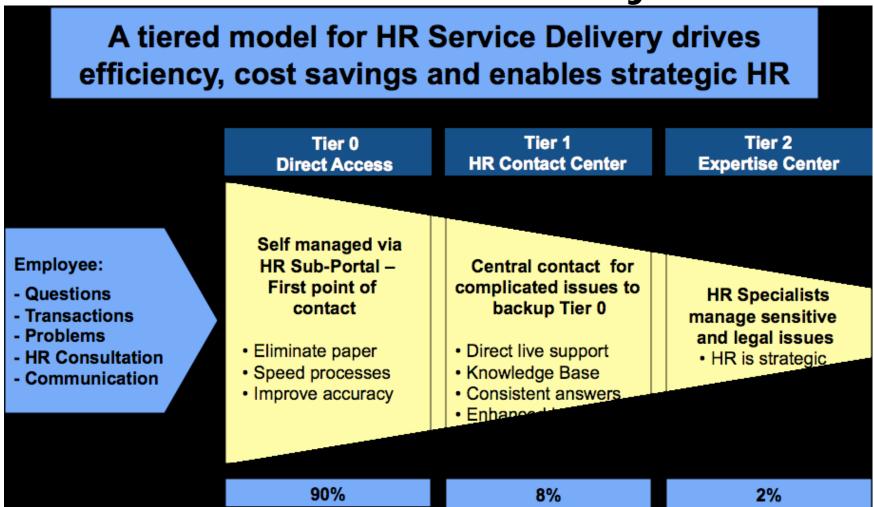


eHR Service Delivery Model & Your Multi-Generational Audience





HR Service Delivery







Digital Workforce Service Delivery

Trend

Employee and manager ability and expectations for digital services is growing

Challenge

- Expand range of HR services delivered digitally
- Deliver digital services in an Amazon.com format

Solutions

- Consolidate service delivery in a single portal framework
- Integrate Knowledge, Content, Analytics and Transactions
- Communicate process change to enhance adoption







Employees are Transforming

- Employees are wired and a ready audience for self service
 - www.pewinternet.org data is powerful illustration of employee readiness
- More Internet access in the workplace
 - Office
 - Factory
 - Mobile
 - Home
- Public websites influencing workplace applications
- Internet services are driving new expectation for knowledge access and transactions
 - Convenience



















New Age Workers

- Digital Native vs. Digital Immigrants
 - -5,000 hours of video gaming
 - -250,000 emails, instant messages, text messages
 - -10,000 hours of cell phone use
 - -3,500 hours online
- 4 in 5 adults have access and only 1 in 5 are truly disconnected (a majority over 65 and without a high-school education)







Internet Usage Facts

- In the past year, the number of adults who are online has increased by 5% to an estimated 172 million, according to the latest Harris Interactive poll.
- Approximately 77% of Americans are now online, up from 74% in the previous poll in 2005, and compared with 57% back in 2000. When Harris first began to track Internet use in 1995, only 9% of U.S. adults reported they went online.
- The latest survey shows 70% are now online at home, up from 66% in 2005 and 55% in the spring of 2002.
- Just over a third of U.S. adults say they are online at work, little changed from a year ago. Adults who are online at a location other than their home or work also remains steady at 22%.







Best Practices in Employee & Manager Self-Service

Direct Access





Shifting Away from Self-Service Term



...the serving of oneself without the aid of an clerk, attendant, etc.

Having no intervening persons, conditions, or agencies; an immediate means of approaching, entering, exiting, communicating with, or making use of information







Evolution of Direct Access Channels

- First wave of transactions Employee focused
 - Flexible benefits enrollment was dominant HR application
 - Fairly consistent process across organizations
 - A new process
 - Employee responsible for transaction
 - Moderate ROI
- Second wave of transactions Manager focused
 - Hire/fire/transfer processes
 - Manager responsible for transaction
 - More variety across organizations product companies struggled to deliver; clients resisted changing processes to meet products
 - Higher ROI
- Third wave is emerging Strategic focused
 - Both Employee and Manager collaboratively engaged in the transaction
 - Performance management, compensation management, succession planning, training, etc.
 - Reporting / Metrics / Dashboards / Libraries
 - Highest ROI







Best Practice Guiding Principles 1

- The Manager experience is paramount; User interface user friendly
- Simplify HR Dept expertise / processes into familiar manager terms
- 2 3 clicks to anywhere
- Graphical business process navigation vs. departmental hierarchy / functional groupings
- Configurable guided / wizard driven transactions
- Support Setup / Configuration using Q&A Approach.







MDA Strategy: Guiding Principles 2

- 'Sticky' content will drive interest and adoption
- Single point of access for all information / transactions
- Configurable workflow and dynamic workflow
- Solve traditional MSS problems:
 - Proxy administration
 - Missing Mgr position
 - Mgr vacation
- Provide design support for phased roll out methodology







MDA Strategy: Guiding Principles 3

- Direct Access MUST be part of an overall eHR Service Delivery strategy; not self-service modules
- Direct Access must be surrounded with other content
- Direct Access must include intelligent reporting manner
- Direct Access must focus on the user; not the administrator
- Design / develop / deploy to the 80% 20% rule; functional requirements cannot be designed for the exception.







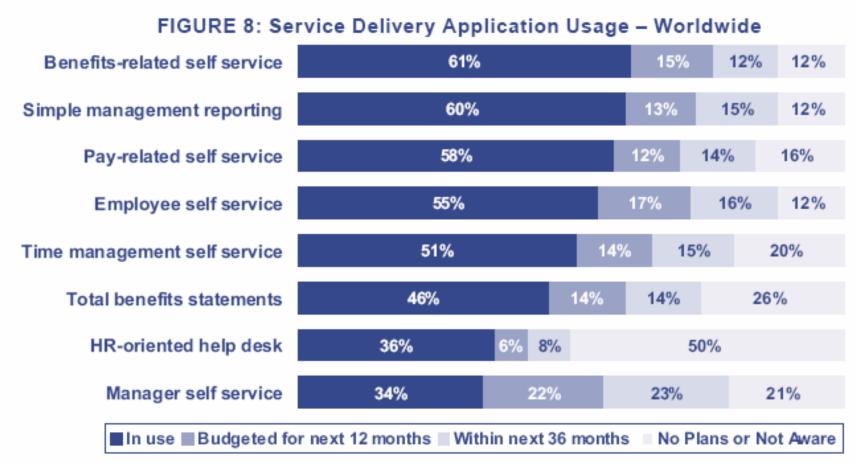
About Your Audience

- Managers often get blame for inability to engage in a digital process
 - Perception they will not use technology is wrong
- Reality is that they don't resist the automation, they resist the process that is automated
 - Process must be simplified to fully drive adoption
- Technology must be leveraged to diffuse process complexity
- Technology must assist in decision making expert capability
- Must deliver a mainstream web interface experience
 - Amazon.com-like









CedarCrestone 2007 HCM Technologies Survey







Get used to the question:

How does a Portal help us...again?



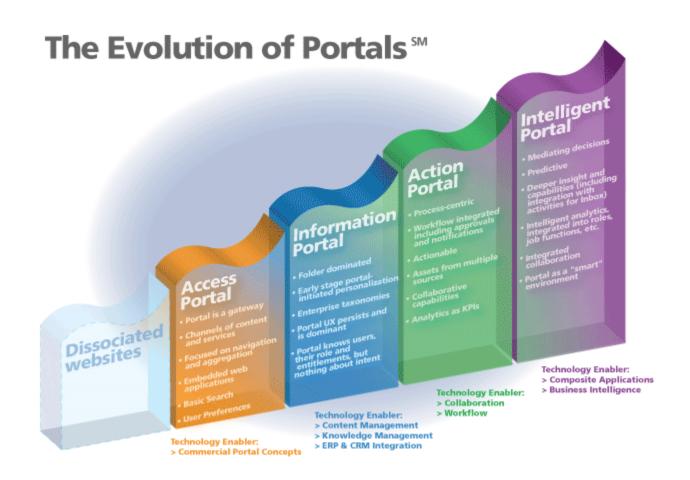


Role of the HR Portal













Communicating the Portal Concept

- Portal is a critical business initiative
 - Necessary to get the 'right data' to the 'right person' at the 'right time'
 - Solve 'info glut', 'GUI glut', 'Password glut'
- Portal term is frequently abused due to its recent gain in popularity
 - Every vendor wants to be known as a portal-play
 - Creates a great deal of confusion
- Abstract presentation layer from applications underneath
- A concept not a technology
- Success involves people and process change management







The Portal Value Proposition

- Increased productivity
 - Reduce time spent searching for information
 - Eliminate information confusion, duplication and inconsistency
 - Eliminate multiple sign-ons and authentications
- Increased effectiveness
 - Enhance communication and knowledge sharing
 - Increase performance by focusing on metrics/results
 - Provide execution of transactions & workflow
- Lower information delivery costs
 - Eliminate report generation and delivery
 - Empower users to author content
- Drive better individual, group, enterprise performance







Characteristics

Characteristics of an Optimized e-Enabled Environment

User



intrinsically increases the value of interactions with assets accessible in the portal

Personalized:

complex logic that increases the value of how constituents interact with online resources

Global:

Supports constituents in multiple geographies and cultures

Resourceful:

rich environment that contains the resources necessary to enable the success of its participants

Supportive:

recognizes the needs of individuals and accommodates with specialized resources or approaches

Collaborative:

enables collaboration with others via formal processes and informal relationships

Intelligent:

leverages intelligence embedded in the business and models the contextual relationships

Adaptive:

recognizes the dynamic nature of the enterprise and adapts, efficiently, accordingly







Portal is About Integration

A Portal is a convergence initiative, overlaying all Enterprise Systems, that enables <u>a single as well as personalized or role-based point of access to all relevant information and applications from internal and external sources.</u>



Key Elements of a Sophisticated Portal A basic scorecard to measure portal sophistication

Portal value grows as services increase

Portal Service	Definition
Single Sign On	Ability to access all applications within the portal via a single password entry/authentication process
Role Based	Applications and content are presented to the user based on role(s) that the employee performs for the organization
Personalized	Employees have the capability to personalize content and layout of the portal
Self-Service - Productivity Applications	Employees have ability to perform HR (and other) transactions in a self-service format – focus on productivity enhancement (e.g. benefits, address change, etc.)
Self-Service - Strategic Applications	Employees have control of knowledge and transactions that tie to strategic growth related to attracting, developing and retaining talent – focus on managers (e.g. compensation mgmt, recruitment, performance mgmt, skills mgmt)
Search	Sophisticated search capability that covers all structured and unstructured information managed via the portal
Content Management	Ability to coordinate structured and unstructured information sources across all applications (i.e. email .doc .ppt .xls etc.)
Knowledge Management	Tools to provide employees the ability to access and process knowledge easily based on the data contained in the portal applications



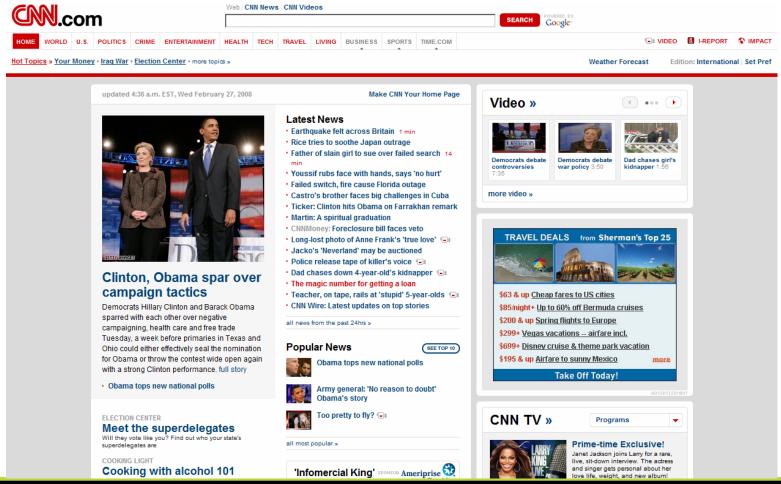


Portal Best Practice





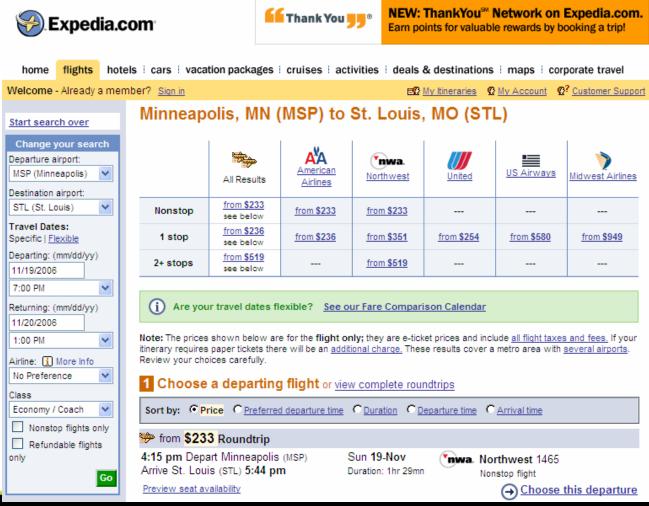
Think of your favorite websites







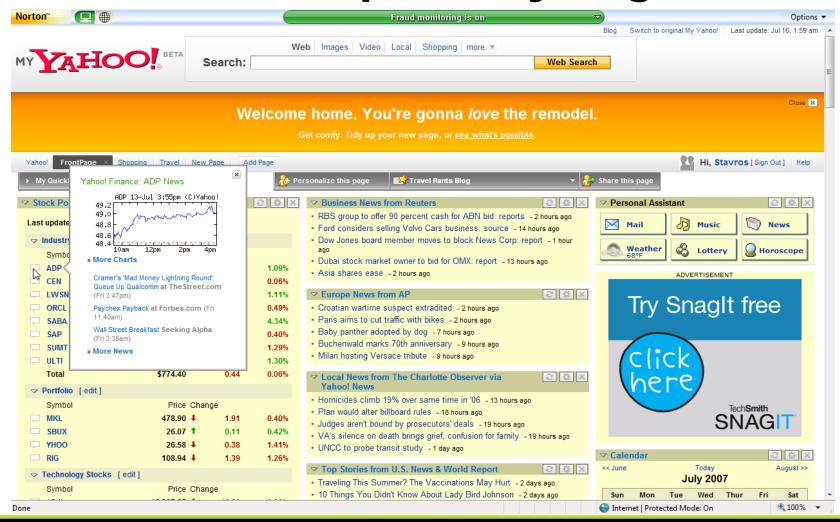
Think of your favorite transactions







Think favorite places you go







Primary Approaches to Driving Use

- Design interface to fit employee needs and expectations closely
- Start small and grow managers a starting audience
- Discontinue alternate channels
- Support the transaction with knowledge
- Align with key organizational initiatives (i.e. portal)
- Create buzz strategically sequence pre-launch communications
- Preemptive change management seed adoption before launch

While strategies differ by organization, delivering <u>Value</u> is universal key factor in driving success.







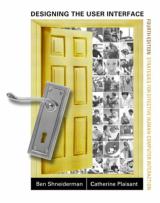
Key Resources for Usability Design

Engage in dialogue with your web design leaders to impress upon them the importance of usability on the success of your self service initiatives.

Here are some key industry resources you can name drop to dazzle them with your knowledge of the Human Computer Interaction (HCI) field.

- Jakob Nielsen www.useit.com
 - 'Tog' Bruce Tognazzini
- Vincent Flanders –
 www.websitesthatsuck.com
- Ben Shneiderman www.cs.umd.edu/hcil





Employees will continue to expect an Amazon.com-like experience.





KCAT Concept

A design philosophy for creating an effective experience which intertwines Knowledge, Collaboration, Analytical & Transactional elements related to a business situation or decision

Let's look at a consumer implementation of KCAT...

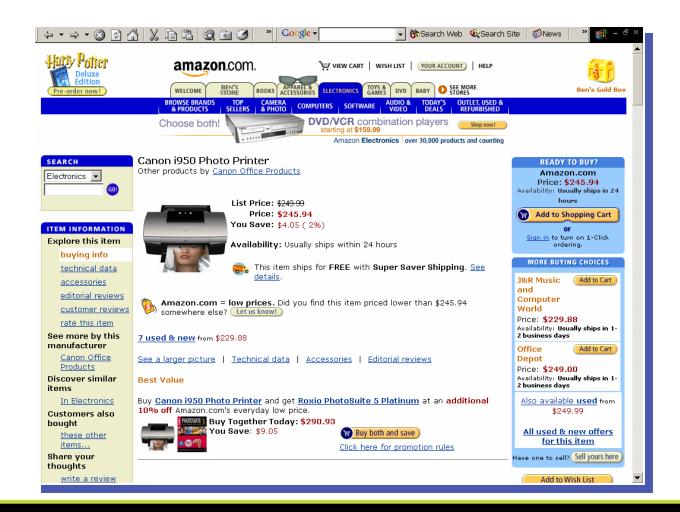








The Amazon.com Experience

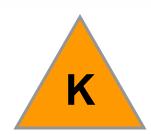






Print appro Check the box to include an item with your order. Print Prin

Knowledge



Spotlight Reviews (What's this?)

Write an online review and share your thoughts with other customers.

71 of 73 people found the following review helpful:

uniform prints.

Reviewer: A Is there an item you'd recommend instead of or in addition to this one? Let the Years ago, I world know! Enter the item's ASIN (what's an ASIN?) in the box below, select background i advice type, then click Submit. paper pro me this time. My I recommend: © in addition to this product C instead of this product

Collaboration



Top-Selling Inkjets
Updated Daily

More top sellers



Price: \$

3. Canor

Customers who shopped for this item also shopped for these items:

- Canon i850 Photo Printer by Canon \$146.94
- HP PhotoSmart 7550 PhotoSmart Printer by Hewlett Packard Click for price
- Epson Stylus Photo 960 Inkjet Printer by Epson Click for price
- Canon S530D Photo Printer by Canon \$149.99

Explore similar items

Analytics



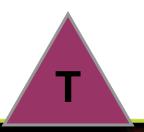
READY TO BUY?



or

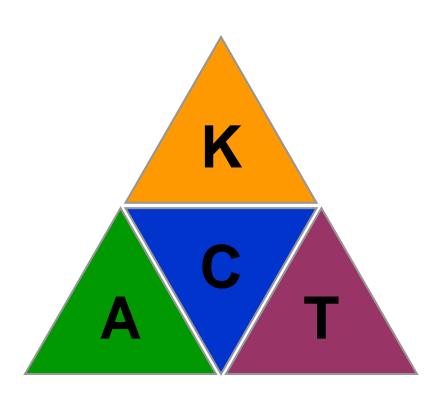
Sign in to turn on 1-Click ordering.

Transactions









Knowledge



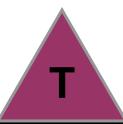
Collaboration



Analytics

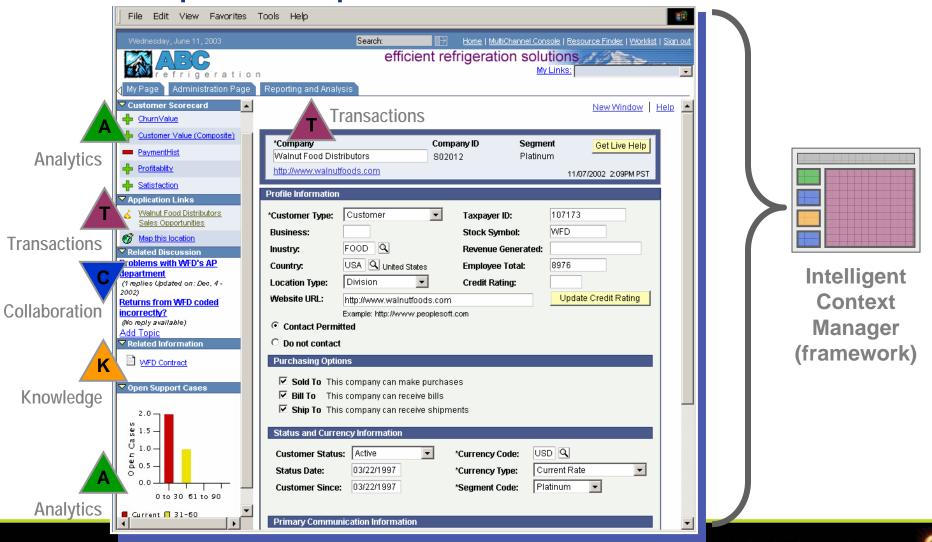


Transactions



How Does KCAT help with business Issues

A customer profile example....









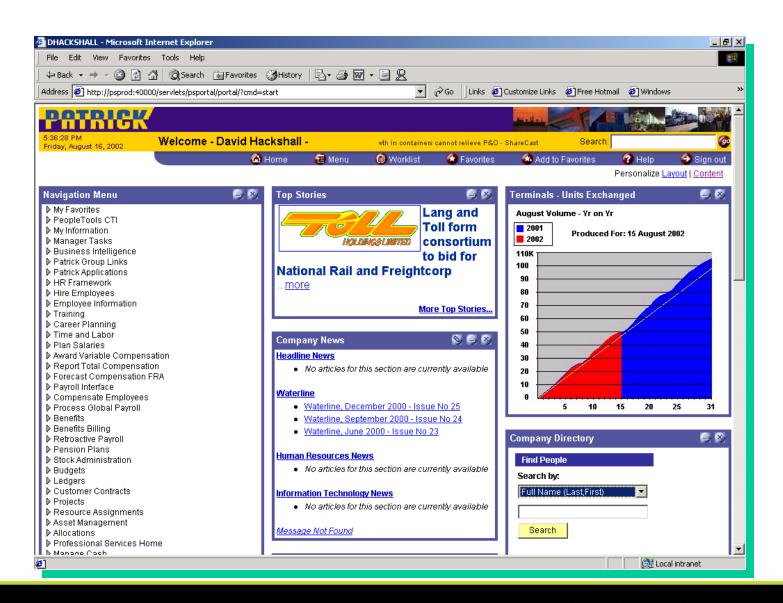






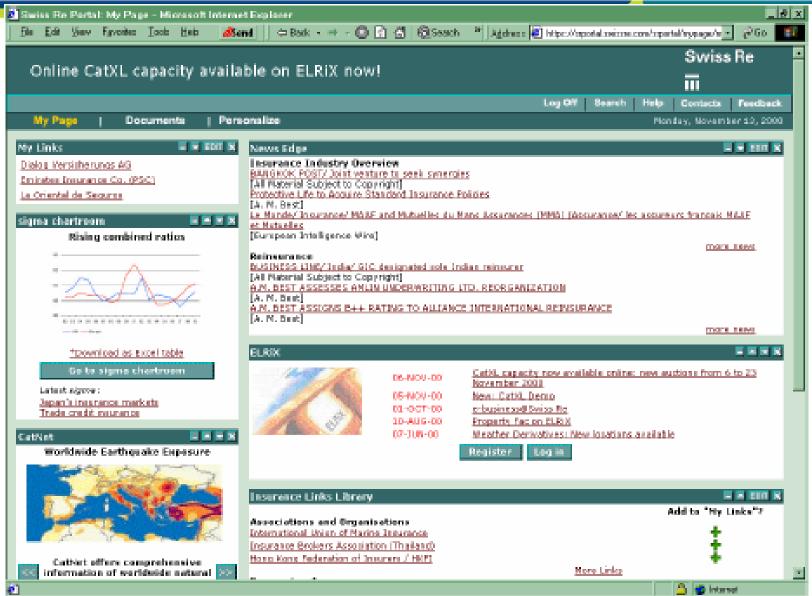






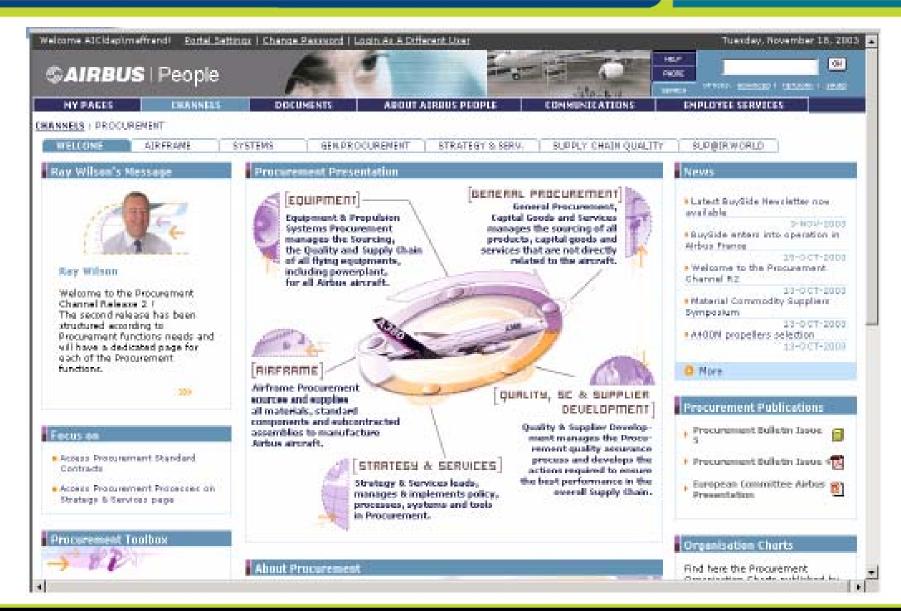




















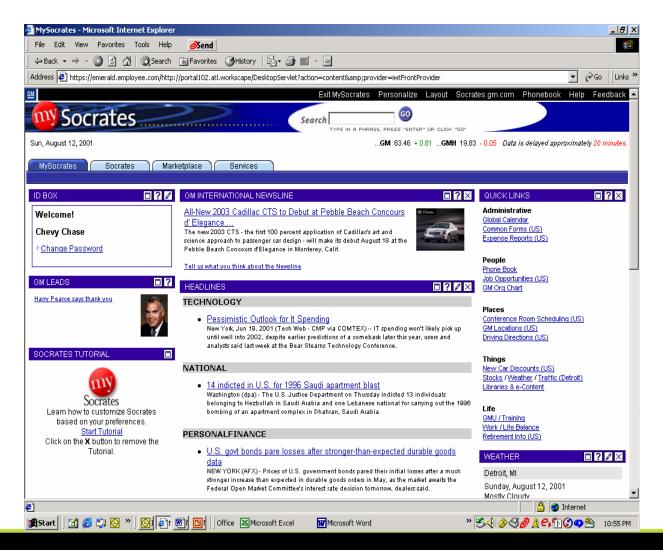








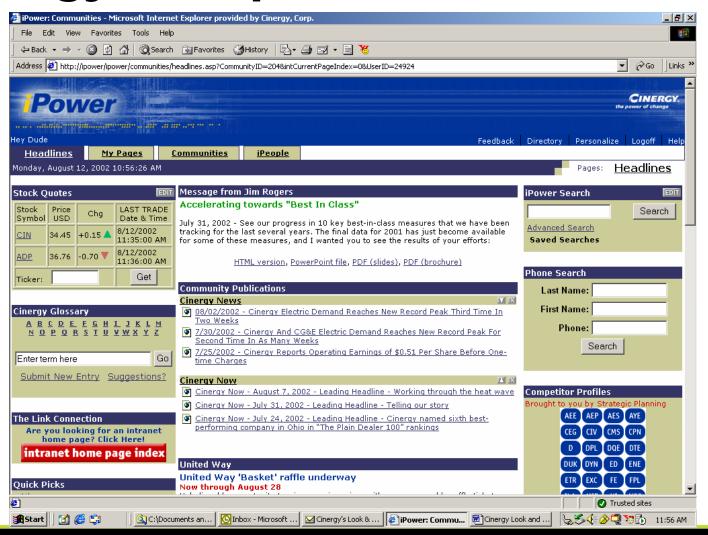
GM - Main Portal View







Cinergy - Corporate Portal View



M Northwestern Memorial Hospital



NM Connect

HOME | SEARCH | INDEX | HELP Friday, August 23, 2002 Manager LOGIN

Home

Employee Resources

Menu

Search:



- Clinical Reference Links
- Clinical Systems
- Departmental Pages
- Employee Resources
- Job Opportunities
- NMH Web Site (nmh.org)
- Patient Charging and Accounts
- Policies
- Share Your Thoughts
- Site Map

Quick Links



Web Paging

Web E-Mail

Calculator



PowerChart

Primes

Cadence



Up UpToDate Online



ED Resource Page



Medical Reference

Patient Education

Clinical Pharmacology



Physician On-Call Schedule



Feedback



More...

My Applications

Happenings

Upcoming Events



Benefits Checkup

http://nm.selfservicenow.com

Now is a great time to check your benefits. Open Enrollment is coming soon!

..more



Back to School Drive - It's that time again.
Back to school flyer

News



Take a deep breath, order white wine

Red wine may be best for your heart, but researchers reported Monday that white wine beats red at preserving aging lungs. "People who drank white wine had greater lung function than those who consumed red wine, but both groups of wine drinkers had greater lung function than non-wine drinkers," says Holger Schunemann of the State University of New York in Buffalo.



Connections - May 31, 2002

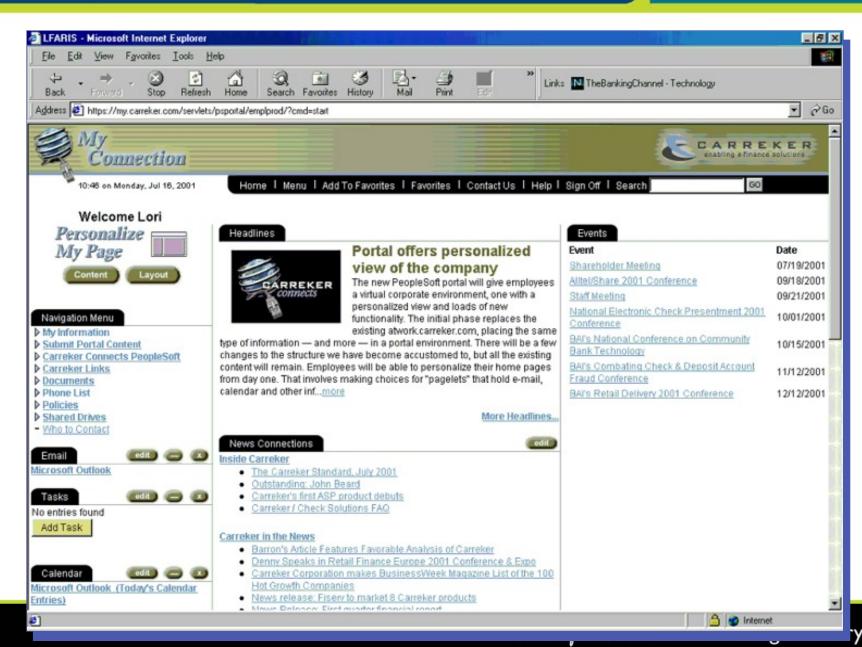
A Newsletter for Employees and Associates of Northwestern Memorial

Announcements

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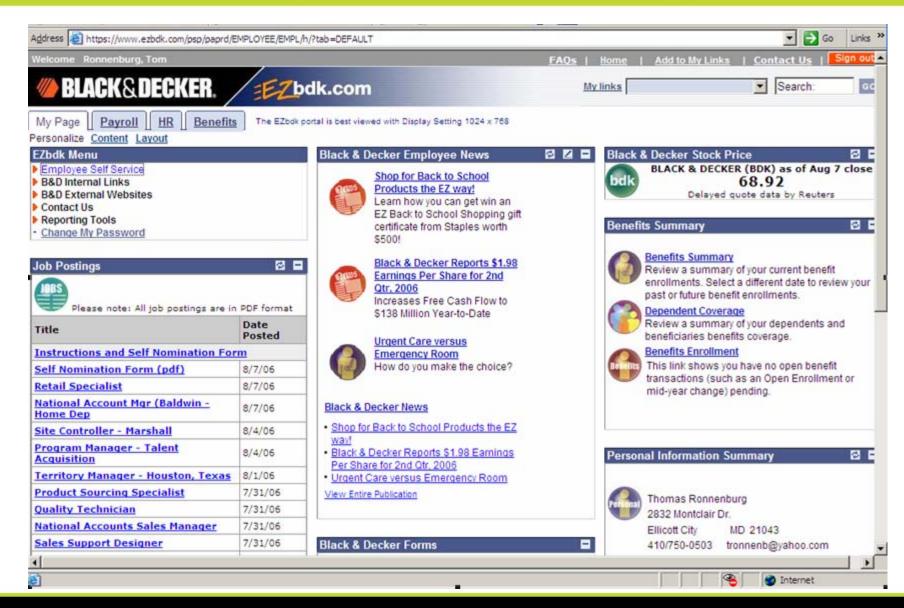




Sign In User ID: Password: Sign In	Welcome to E7bdk.com	EZ.
First time user click here! Forgot your password? FAQs System Alerts	your personalized web portal	sign-on
	onto EZbdk? Click on the link <u>First time user click here!</u> before signin Zbdk ID is your LAN/PC ID and your password is your LAN/PC pas	111111111111111111111111111111111111111
and your password is the tempor the letter, please understand th least 10 days have passed from cause the system to cancel ear	you received a password letter? Your ID is your full employee dary password shown on your letter (case sensitive). If you request it takes 7 to 10 days to mail this to your home address. DO In when you requested your first password. Repeated requests like passwords already mailed to you. If you forget your password link. If you send us an e-mail requesting a new password, we have the format My Password link.	NOT request a second password until at not separated by at least 10 days will d, the only way to receive a new one is



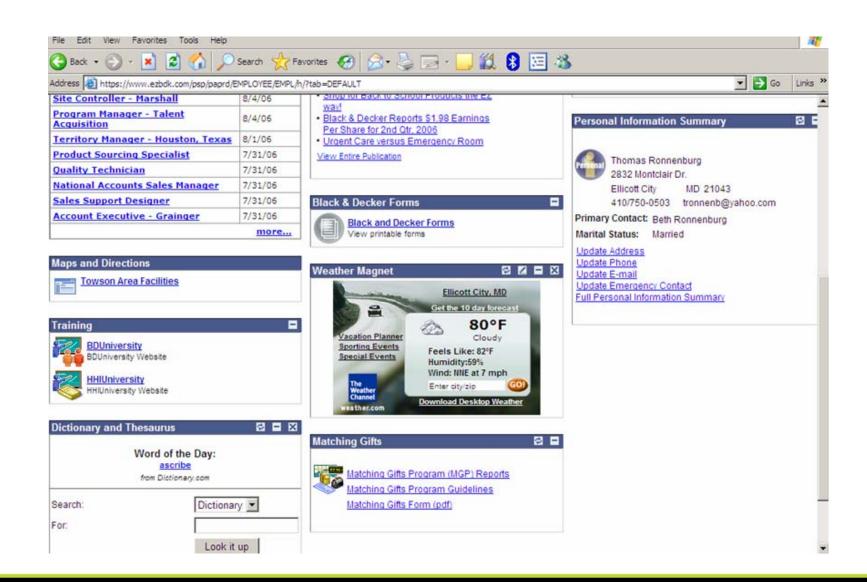






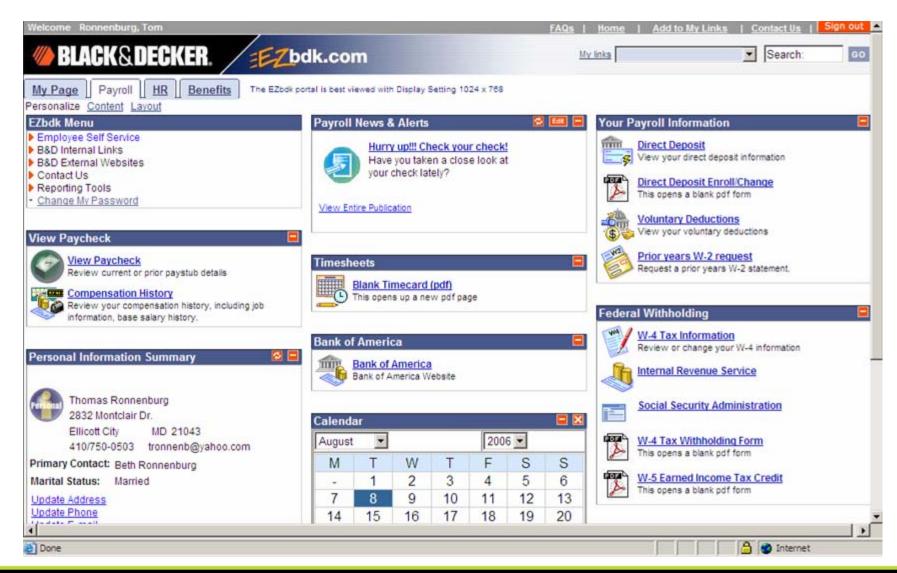






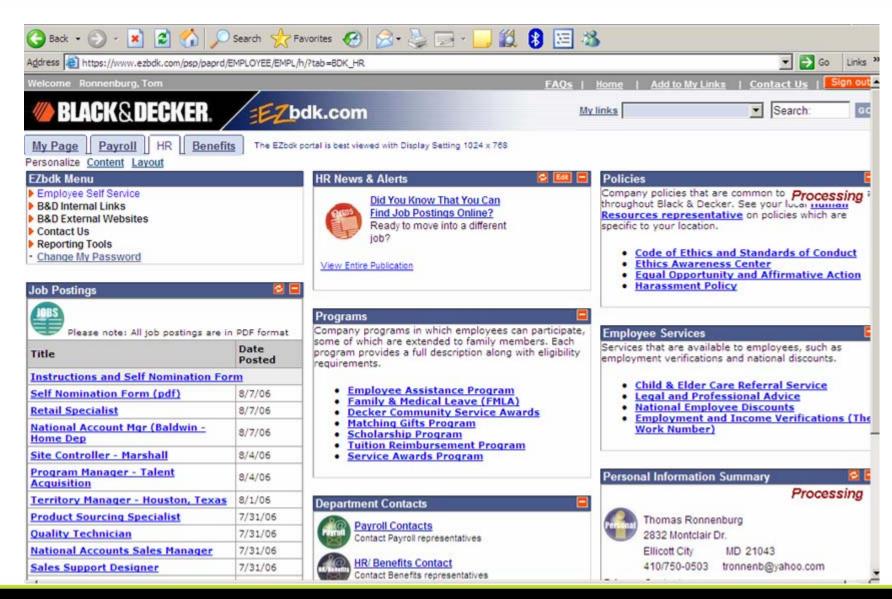








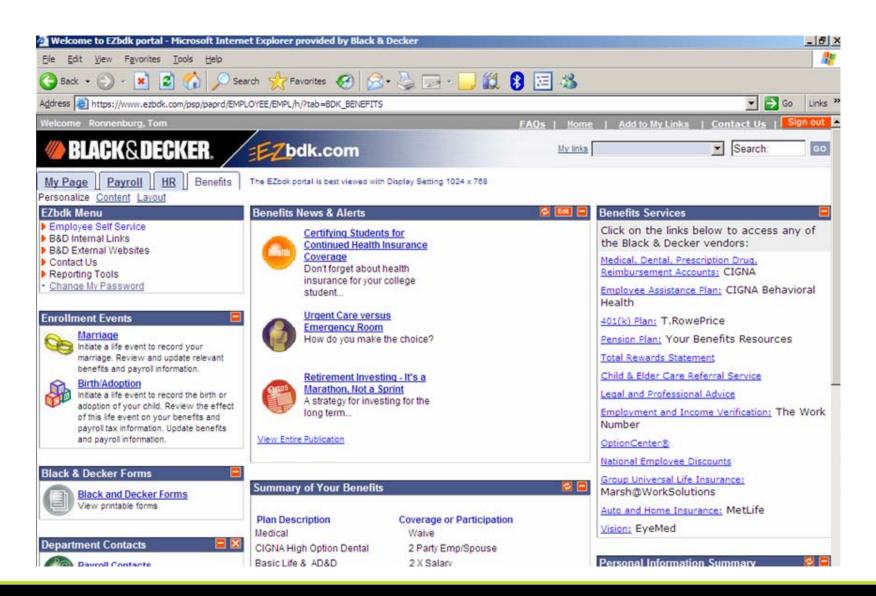
















Lessons, lessons





Top 10 Lessons

- 1. Communicate vision as broadly as possible
- 2. Establish clear and detailed plan of action
- 3. Engage the business leaders & stakeholders
- 4. Hire a content editor: make it worth using
- 5. Define ownership of tools vs. content
- 6. Bring in a consultant: they help
- 7. Create process for prioritization
- 8. Focus on "quick wins" to build on
- 9. Plan for iterative development to avoid "analysis paralysis"







Build a User-Centered Portal

10. Vigorous Usability Testing

- Conducted portal study of MyYahoo, MyFidelity, MyExcite
- Conducted navigation testing using portal prototype
- Arranged accessibility testing sessions with target manager and employee segments
- Performed testing of personalization features and options
- Work to have only <u>one</u> portal







Thank You

Questions / Answers

www.knowledgeinfusion.com/coe



