Modernizing the Employee Experience

Driving organizational performance through digital transformation

salesforce | HIGHER ECHELON™

Modernizing the Employee Experience

Today's workforce is ever-evolving and constantly adapting to technological advancements. Whether personally or professionally, the modern employee understands the technological landscape and its capabilities. With current work environments that require multiple access points, redundant information, and create overall frustration when executing simple tasks, employees are starting to demand more. Today's employees look for modern employers that engage with them how they want to be engaged. Doing so creates positive energy, productive employees and, ultimately, satisfied customers. Accordingly, today's enterprises must remain modern to compete across industries for the best recruitment, retention, productivity, and innovation. Digital transformation is at the core of modernization and doing so through Salesforce helps large institutions economically solve their most complex problems.

> "In this fast-paced, globalized world, the ability of employees to connect, collaborate, and innovate will determine the ability of an organization to thrive and survive."
>
> –Harvard Business Review

Salesforce is a trusted platform used by many public and private sector organizations for their modernization and digital transformation efforts. The cloud-based platform is easily configured to many use cases including those specific to employee engagement and experiences. HigherEchelon, Inc. is a Silver Certified, trusted partner in Salesforce Implementations and Human Capital consulting. Their efforts in both spaces have yielded Salesforce solutions for many applications including recruiting, talent and performance management, Human Capital process automation, and virtual workspace enhancement.

Government agencies are focused on modernization

Government agencies and organizations are increasingly turning to Salesforce for their modernization efforts. With the 2019 White House release of IT Modernization policies, agencies are now, more than ever, turning to commercial cloud-based products for their solution needs. Specifically, due to its adaptability, the Salesforce platform is at the forefront of the modernization effort for government agencies. Their cloud-based solutions break geographic barriers and serve a diverse, dispersed and mobile-centric workforce.

The current environment that many organizations find themselves in is one of aging infrastructure and conflicting priorities. Systems that were homegrown and/or highly customized 10-20 years ago are nearing end-of-life, and the institutional knowledge of how to run and maintain those systems is exiting the building through attrition. As companies and organizations think about a path forward, they are under pressure to select best of breed solutions and/or build replacement systems from the ground up using their existing in-house development staff. Of course, the proverbial 'cloud' is on the minds of IT leaders, and evaluations are ongoing on whether the

cloud is ready for the enterprise and can be trusted for mission-critical workloads. All of this leads to a confusing concoction of options that often results in high costs of system integration and high Total Cost of Ownership (TCO) due to diffusion of buying power and additional resources needed to maintain highly customized solutions.

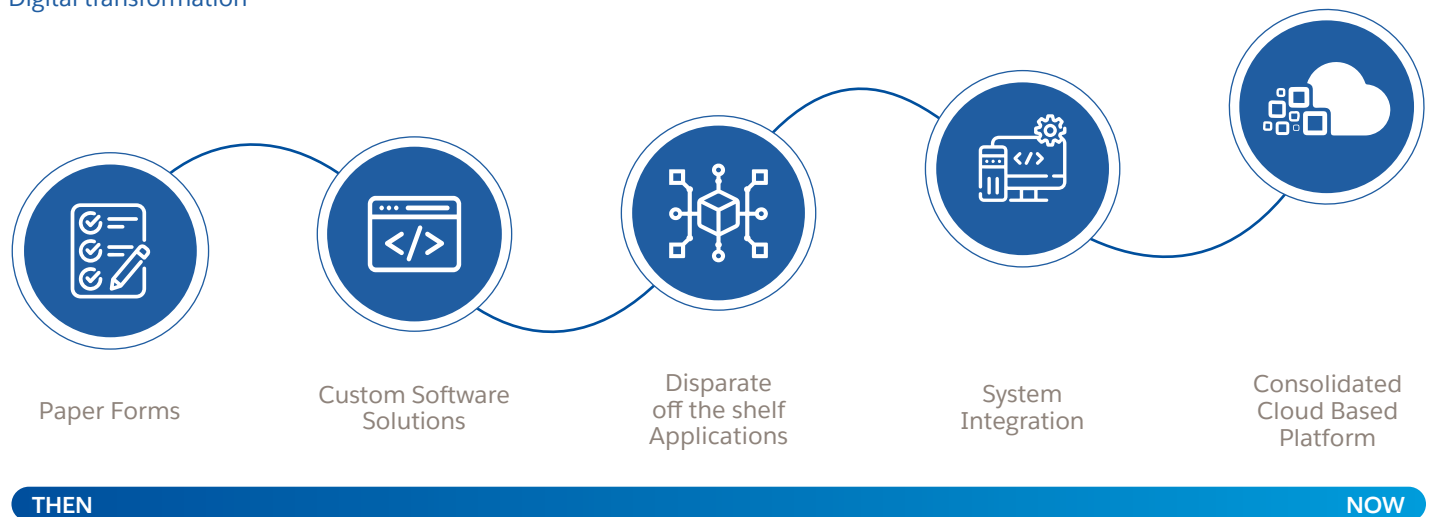## Why the platform facilitates agility and transformation

As institutions have grown, a simpler solution has been demanded. One that doesn't rely on data-centers and can replace broad swaths of enterprise applications, all in a mobile-centric environment configured almost entirely without complex code. That solution is Salesforce. Many are with Salesforce for traditional Customer Relationship Management (CRM) solutions. Less obvious is that the platform underlying Salesforce's CRM (Sales Cloud) and

Case Management (Service Cloud) products, is very flexible and can be configured to handle much more than out-of-the-box services. A management platform at its core, Salesforce can automate most any business process and consolidate the numerous tools/systems needed for operations. The result is a sleek operational ecosystem that requires only a single access point yet offers unlimited productivity, analytical power, and employee satisfaction potential.

Large institutions such as the Department of Defense, Veterans Affairs, and many others are already realizing the value of such enhancements for many of their people-based workstreams. Why? Because these enhancements combine to reduce administrative time and increase time spent serving constituents. Ultimately, they are investing in their mission by investing in their people through an operational platform suited for their needs.

GOVERNMENT MODERNIZATION JOURNEY
Digital transformation

| Paper Forms | Custom Software Solutions | Disparate off the shelf Applications | System Integration | Consolidated Cloud Based Platform |

THEN   NOW

"Improve the relationship with disengaged employees to increase employee retention by 18%"

EMPLOYEE TRANSFORMATION PATHWAY

● Employee Tools & Service   ● Recruiting & Talent   ● Employee Insights

Establish Employee Application Launcher

Deploy Employee & Recruit Service Portals

Deploy Recruiting Application

Digitize Talent Management

Configure Employee Analytics & Intelligence

Productivity

Real-Time Awareness & Collaboration

Proactive Recruiting

Talent Deployment & Retention

Management

The employee experience is a journey of engagements

When an employee can use their phone to do their taxes, order a latte, and share information across continents, they expect the same ease of use and functionality from their own work environments. This means all organizations, regardless of industry, are held to the standards set by tech giants that shape the way employees consume. The organizational imperative is to shape the way employees work.

Much more than HR processes, the employee experience is a journey produced by continuous cycles of engagement. These engagements combine to form the employees' impressions and opinions about the company and directly impact organizational performance. The initial engagement for all employees involves recruiting and onboarding processes. After onboarding, employees often have one-time needs such as accessing policies, submitting a form, requesting IT help, and sharing/maintaining records of each. Beyond ad-hoc interactions, employees are continuously engaged in training, operations, evaluations, and development opportunities. All engagement cycles have a significant effect on the employee experience and the potential to digitally transform it accordingly.
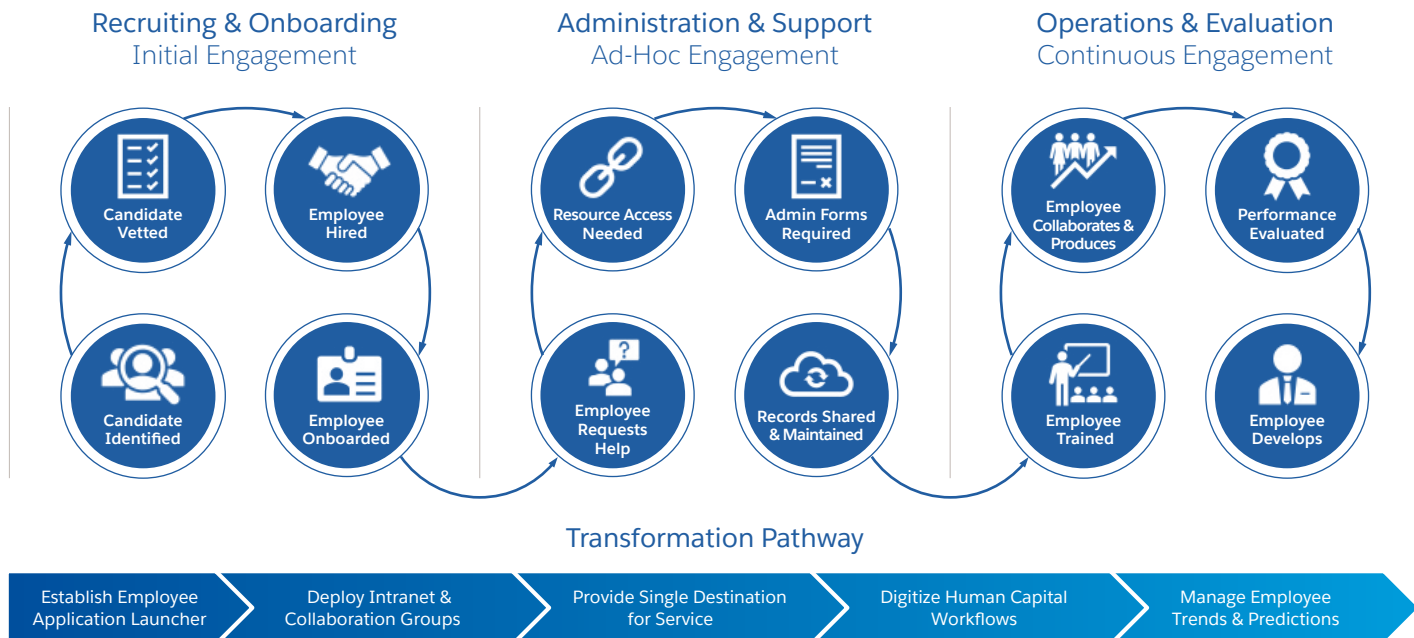
How to evaluate where to modernize first

Salesforce has a concept called "Transformation Pathways" which guides organizations on a modernization journey. The Pathways help organizations identify the enhancements needed to improve their productivity, collaboration, knowledge & service, workflows and ultimately performance management. This pathway creates a roadmap for IT with proven solutions for each one of these employee engagement points. Typically, we see that creating a guide like this can lead to a multi-year strategy that delivers the outcomes needed to move an organization forward and:

- Creates a common work environment and knowledge base across the organization
- Transcends geographic barriers and enhances communication
- Creates data relationships enabling automatic analytics and trend identification
- Eliminates numerous, disparate software needs.

These benefits often result in increased productivity, retention, sales, and satisfaction.

SALESFORCE PLATFORM

Recruiting & Onboarding Initial Engagement	Administration & Support Ad-Hoc Engagement	Operations & Evaluation Continuous Engagement

Recruiting & Onboarding — Initial Engagement
- Candidate Vetted
- Employee Hired
- Candidate Identified
- Employee Onboarded

Administration & Support — Ad-Hoc Engagement
- Resource Access Needed
- Admin Forms Required
- Employee Requests Help
- Records Shared & Maintained

Operations & Evaluation — Continuous Engagement
- Employee Collaborates & Produces
- Performance Evaluated
- Employee Trained
- Employee Develops

Transformation Pathway

Establish Employee Application Launcher	Deploy Intranet & Collaboration Groups	Provide Single Destination for Service	Digitize Human Capital Workflows	Manage Employee Trends & Predictions

One platform for all experiences

The Salesforce Platform has out of the box technology adaptable to almost any use case. Rather than purchasing, building, or fixing numerous disjointed systems to serve process goals independently, Salesforce's platform is configured to unify organizational goals, streamline business processes and consolidate employee engagement cycles into one system. Doing so after having leveraged the Employee Transformation Pathway planning process enhances many organizational goals: productivity, collaboration, knowledge, service, workflows, and management.

The Employee Transformation Pathway takes organizations on a modernization journey. Beginning with identifying the first place for a system standup and ending with enhanced predictive analytics, the entire journey is designed with the employee experience in mind. Transformation in this context means taking processes and digitizing them, one by one. Think of employee engagement cycles as software applications and the processes within each cycle as data to be captured and optimized. Just like your organization, all engagement cycles and processes are related to each other and integrated within the multiple organizational complexities, i.e. divisions, products, service lines, geography, etc. **Creating a platform with employee-centric workflow applications that interact with each other takes a software solution from a process level to an enterprise level.** Let's dig into some of these processes and how to think about the benefits of modernization.

Recruiting & Onboarding

The first time an employee experiences your organization is during recruitment and onboarding. Both processes are data-heavy and require involvement from numerous stakeholders. Digitizing these processes through automation, task initiation, and enhanced communication ultimately takes

a process from disjointed paper applications and e-mail back and forth to a centralized workflow that impresses.

Recruiting

Thoughtful configuration of data objects and consideration of process roles take recruiting to the next level in Salesforce. By using any of the numerous software API integrations and Salesforce's process builder, you can pull data directly from an application and automate the workflow after a candidate's been received. Alternatively, one can take ownership of the application process and build a custom form suited to your needs. Post-application, all information gathered throughout candidate evaluation can be captured and shared on the Salesforce record, centralizing knowledge. The overall result – a streamlined system that propels candidates through the recruiting pipeline and quickly into production.

Onboarding

Onboarding employees has huge organizational impacts. Employee data must be captured, employees must be trained, and systems must be set up to ensure long-term success. Often, successful execution of this process hinges on the employee's task awareness. Using digital tailored checklists that walk the employee through the required tasks empowers them to take action and minimizes confusion. Moreover, status buttons on the checklist keep stakeholders informed and allows for automatic "nudging" functionality. Most impressively, digitizing HR forms and reducing data entry to a single point reduces the administrative time and technological barriers required to successfully onboard.

Administration & Support

Administration and support engagements occur sporadically throughout an employee's journey. Often born out of the need for information or help,

employee self-service is the digitization goal. In addition, reducing the requirements on your back-office team and enhancing the way they manage requests saves time and resource needs.

Administration

One way to enhance employee self-service is through an employee portal or intranet. Leveraging both the Lightning and Community platforms, an organization can create a branded platform experience that establishes many access points. Additionally, using Cases, support functionality with automatic request routing is easy.

Resource Access

Large organizations often have numerous knowledge and resource repositories to share. Disparate access points make it difficult for employees to remember what's where or even what's available, often leaving them confused and resorting to reaching out to another employee for help. By leveraging an employee intranet, you can include intuitive links to all resources so things like "find my payroll calendar" are as easy as a click. Additionally, all Salesforce applications can be included in the portal as tabs or launched using the employee app launcher. Ultimately the intranet provides the singular access point for an employee to achieve all their tasks.

Form Creation & Routing

In addition to resource access, employees often have resource needs. A simple request to hire an employee or add them to a system can require multiple points of data entry and approval. Automating this process through Salesforce is easy. Objects can be customized to include all information fields required and process actions can be automated and tracked within the system, including automatic routing to stakeholders based on the data input. The solution is as simple as click – input – send.

Support

Inevitably, employees will still need direct support to resolve issues or complete tasks. Often these requests happen via phone or email, requiring the support personnel to manually track what's been asked of them and limiting resolution visibility which causes issues to recur. Using Salesforce's case functionality, employees can virtually submit requests that automatically queue on the support personnel's portal for quick and easy resolution. Additionally, employees can chat back and forth on the request in question to keep matters focused. This functionality supports overall trend identification and helps organizations continuously improve.

Operations & Evaluation

The third and most continuous engagement cycle is operations and evaluation. Enhancing this cycle means enhancing an employee's day to day workflow and task management structure. Additionally, by operationalizing data entry, more data is captured which increases visibility and enhances management potential.

Operations

Training and management are key components of operations. As with any requirement, tracking progress and metrics are crucial to meeting goals. Doing so in a singular Salesforce environment allows for enhanced analytics drawing relationships from employee inception to project performance.

Training Portal

Training is a large part of operations. Whether elective or required, training scheduling, tracking, and evaluating can require numerous systems to accomplish. In Salesforce, all functions are possible through custom checklists, calendars, and survey integrations. Moreover, tracking training progress in tandem with project and personnel performance, allows management to hone in on what right looks like.

Management Portal

Management is the crux of organizational performance. People, processes, and progress all must be managed day in and day out. When employees have operational needs and management has visibility needs, the solution is to unify the goals into one system. By leveraging sophisticated native Salesforce project applications and configuring it to your organization, a management portal that tracks progress at all levels becomes the result. Dashboarding and sophisticated reporting at the project manager, management, and executive leadership levels provide real-time data on key performance indicators, which takes a data-based approach to decision making and ultimately speeds it up.

Evaluation

Performance evaluation is necessary for employee and organizational development. What can often be a tedious paper-based process, can now be digitized into an automated paperless process. The same concept of form automation can be applied in this setting. The employee benefit is time and headache saved completing evaluations, while the organizational benefit is increased management capacity. With careful consideration of what right looks like for an organization, quantifying performance becomes an easy task that helps inform development decisions and creates career traceability.

The Enterprise Management Platform

Ultimately, the organizational goal is to manage the enterprise on a modern, integrated platform. One that can manage all engagement cycles, adapt to most processes and provide an engaging experience. Employees demand advanced technology. Without it, inefficiencies are inevitable and frustration mounts. With it, organizations are empowered with data, scalability, and speed of service.

Solutions in Action

Many government and commercial customers are blazing a path to modernize the employee experience. With any large-scale implementation, legacy software must be considered and leveraged to avoid reinventing the wheel. Salesforce's capabilities to seamlessly integrate with existing software such as PeopleSoft and USA Jobs, amongst countless other software systems, reinforces the consolidation model and ensures one access point for business needs.

Candidate Management System for an Elite Academic Institution

A well-known public academic institution runs an extensive summer leadership academy that requires managing candidates from application to task assignment. The process, which was highly paper based, needed modernizing to create improvements and efficiencies in their operations. HigherEchelon's objective was to enhance and automate multiple processes related to the program administration through the implementation of Salesforce Service Cloud, Government Cloud, Communities, and Marketing Cloud. The new system included many features:

- An online portal with automated processes capable of supporting 6,000 applicants and 1,100 participants while significantly streamlining the existing paper-based process.

- Automated provisioning of the participant to the online Community.

- Online payment capabilities via "Chargent" replacing the previous check/money order payment method.

- A trackable feedback loop allowing USMA personnel to quantify common issues for feature enhancements.

- Electronic capture and maintenance of critical documents via "S-Docs".

- Automated email communications with participants.

- Online Community for staff personnel to post FAQs.

Recruiting Platform for a State Government Outreach Program

A large government institution within the State of California hosts three youth academies to provide community-based programs that lead, train, and mentor at-risk youth to become productive citizens. The academy requires significant administration effort to identify, process, and understand the participants. HigherEchelon's objective was to automate the Academy recruiting processes by developing enhanced efficiencies, new communication capabilities, and an effective data management process. The new recruiting solution features:

- An online portal with automated processes capable of supporting the entire application lifecycle, significantly streamlining the existing paper-based process.

- Real-time tracking and reporting providing a 360°view of candidates.

- A centralized location to log, track, and store all applications and documents with role-based restrictions.

- Mobile functionality for mobile staff.

- Enabled Chatter to promote collaboration between staff, recruiters, and candidates.

HigherEchelon's Enterprise Management Platform

At HigherEchelon, we have taken the base Sales Cloud solution and have extended it to handle a wide variety of tasks including Recruiting, Employee Onboarding, Talent Management, IT Ticketing, and Project Management. Doing so has allowed us to create a uniform experience for our users that has simplified our processes, increased employee satisfaction, and scaled our business without dramatically increasing our back-office staff. Specifically, we have streamlined the end-to-end process of managing employee data, to the point of virtually eliminating paper altogether.

A simple example: an incoming candidate inputs their home address as part of the application process, which is then pulled to complete onboarding paperwork. Ultimately, that employee never has to waste time rekeying their address on multiple HR forms. What's more, by integrating with a third-party electronic signature tool, the forms can be filled out and completed without ever printing a document. Throughout the entire process, tracking is enabled such that metrics on completion and intervention for problems/bottlenecks are easily achieved.

Other System Features:

Customizable Community Page Provides Intuitive System Access

Recruiter View Provides Concise List of Open Positions and Candidates.

Action Buttons initiate recruiting tasks, such as phone screens, and track activity, all accessible on your mobile devices.

These examples illustrate a broader theme about the flexibility of the platform. The functions performed here are not traditional CRM, and yet the extensibility of the core solution allows for much greater value to be derived from the investment.

About Salesforce

Salesforce transforms government agencies and their industry partners into highly connected, efficient, and productive organizations. The Salesforce Platform accelerates transformation to deploy solutions with a multi-tenant cloud infrastructure that meets security and compliance requirements. To learn more, visit www.salesforce.com/government or call (844) 807-8829 to speak to a government expert

About HigherEchelon

HigherEchelon, Inc. (HE) is a Human and Organizational Performance consulting firm with offerings in leadership, technology, engineering, and organizational development to both public and private sector clients. As such, we work at the intersection of leadership and technology to help organizations overcome their challenges and reach full potential by optimizing the output of people, processes, and tools. For more information about our Salesforce Implementation Practice visit our website or visit us on app exchange.