

# HRACUITY<sup>®</sup>

## Employee Relations Technology Platform

### BUYER'S GUIDE



## A Note From Our CEO



Keeping up in today's changing HR and employee relations (ER) environment is a challenge. As HR and ER leaders, we're surrounded by change and choices — not just when it comes to the tools we use to manage our day-to-day priorities, but strategically when it comes to creating fair and safe employee experiences, equipping executives with actionable insights for decision-making and collaborating with senior leaders across our organizations.

When issues arise, how we manage them impacts not just our employees, but also our organization's reputation and brand. As HR and ER professionals, we need to listen to employees' concerns, investigate unacceptable behavior and ensure that all are treated fairly and consistently. Equally important is the overall employee experience (EX).

Our roles here have expanded, as we now are more strategically aligned with senior management in how organizations define and support employee experience. We are not only expected to create and evangelize a vision of employee experience, but also identify the levers of employee motivation and productivity.

To accomplish those goals, we need the right tools, data and analytics to identify critical gaps, like pay equity; manage escalating trends, like the gig economy; and address harassment and discrimination in today's #MeToo era. We need proven best practices, processes and technology that help us strengthen the strategic collaboration across HR, executive teams and employees. Ultimately, we need to make proactive decisions that drive our teams and our organizations forward.

With this buyer's guide, you'll get the knowledge and confidence you need to make the right decisions for your organization — decisions that help you drive compliance, protect your brand and your employees, build the culture you want and achieve greater organizational effectiveness. We will also offer tips to inspire your journey and elevate the way your organization thinks about employee relations.

If you have any questions, please reach out to me directly or anyone on our team. We are employee relations experts and we know the challenges you are facing. We're here to help.

A handwritten signature in blue ink that reads "Deb J. Muller".

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# Table of Contents

Why Do I Need an Employee Relations Technology Platform? .....	4
What are My Options for Employee Relations Software? .....	5
What are the Important Features and Functionality for My Organization? .....	11
Build Versus Buy .....	12
Making the Business Case .....	13
Selling to Your Stakeholders .....	14
Summary .....	15

## Why Do I Need an Employee Relations Technology Platform?

A single employee issue can easily cost you time, legal fees and damages — and even worse, reputation. Using a technology platform with built-in intelligence helps you identify, track and investigate employee issues quickly and accurately, document and manage employee cases and uncover trends to inform decisions. Most platforms offer reporting capabilities and even templates that guide a best-practice approach to conducting investigations.

In other words, the right employee relations technology can offer valuable insights that help you do what you're already doing, but better and more accurately. The tricky part is finding the right solution for your company's unique needs.

### Key Takeaway



Employee relations requires a unique approach, specialized technology and a dose of innovation. Just like you'd go to a trained specialist for your health — the same idea applies to your employees.

Learn more [here](#).



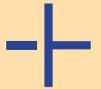
# What Are My Options for Employee Relations Software?

At the most basic level, you need a way to methodically and efficiently track, investigate and analyze issues. While there are many solutions designed to accomplish this goal, understanding how each one works will help you identify the one that's right for your organization (or validate your current method).

Let's look at the different systems used today.



## Key Takeaway



Think about a few examples in your day-to-day experiences where an ER technology solution would be valuable. For example:

### Reporting to Senior Leaders

The right employee relations software can help you be predictive with your data and tell a story about your culture and business-related issues. Using an ER technology solution, you can integrate both internal events, like a holiday party or sales meeting, and external events, like #MeToo or a recent election. Plus, by delving into certain trends and spikes, you can validate your ROI for creating a new policy.

### Benchmarking What Success Looks Like

An ER technology solution can also help you see how your organization stacks up against others. With this, you'll get a clearer picture of where you are today, where you want to go, how you should be spending your time and goals for improvement.

# 1 Basic Systems

Basic approaches to managing employee relations are just that: basic. They include tools like spreadsheets, email and shared drives — and are often the first go-to methods for smaller businesses and startups. Word of caution: while inexpensive and readily available, basic systems like these come with drawbacks.

## Documentation

The skillset required for these simple systems is fairly basic — but your employee relations data is anything but basic. There are limitations to the type of information that can be stored (e.g. Excel doesn't allow attachments). Plus, cases are often scattered in different places and entered in different ways by different people, making data difficult to retrieve and preserve. **Scalability becomes arduous, if not impossible, and the lack of consistency can put your organization at risk.**

## Investigation

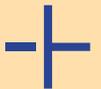
While collaboration software like Google Sheets, SharePoint and shared drives can help facilitate sharing data, they pose compliance and/or ethical risks to the organization when it comes to security, confidentiality and the ability to maintain anonymity. Access is managed by the individual and it's hard to block permissions by issue or location, which makes it easy for confidential information to be shared without the appropriate authorization.

## Reporting & Analytics

Basic systems can report on simple matters, like the date a case was opened or closed — but it's what happens in between that usually reveals vital details about what's going on in your organization. Consequently, limited search and reporting functionalities will prevent you from tracking by people, cases or issues.

If you can't record the dots, you can't connect them. Missing, inaccessible or lost data makes it nearly impossible to spot trends and detect patterns of behavior that you need to proactively manage.

### Key Takeaway

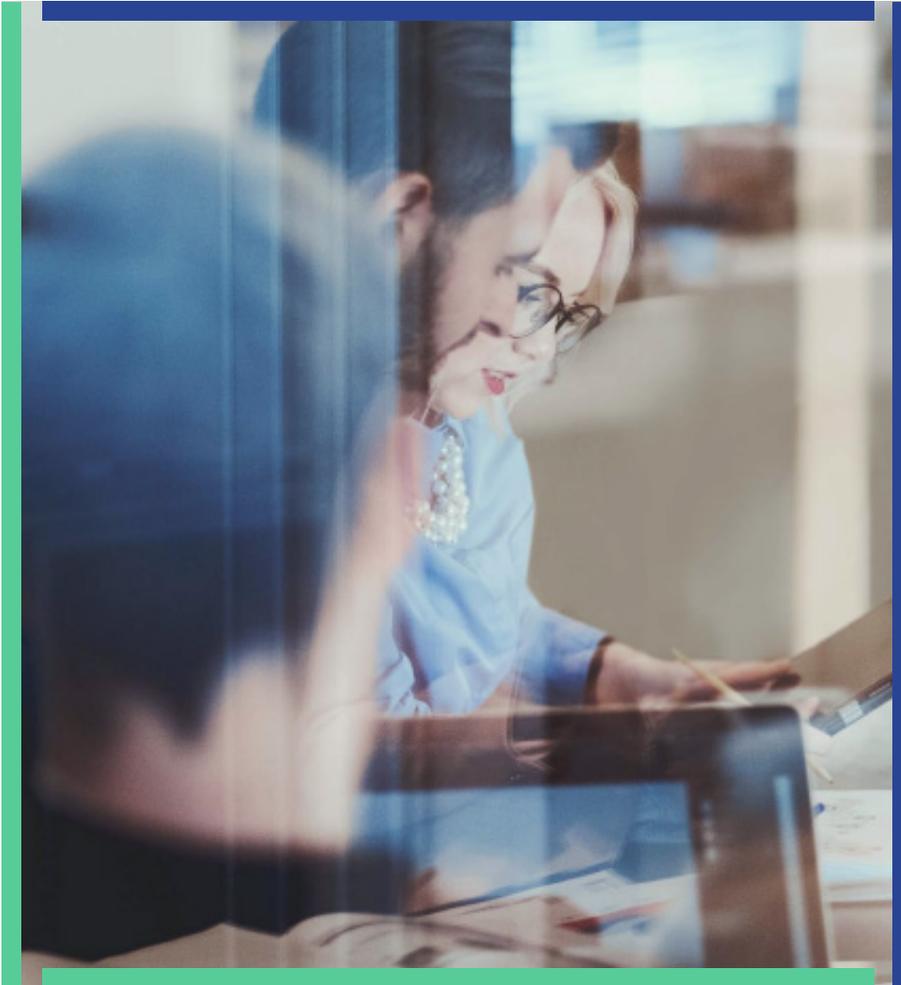


Basic systems are simple but come with major limitations:

- They don't address the "how"
- There is no consistency among investigators
- They don't connect the dots
- They don't address employee experience

## 2 Legacy Case Management Systems

You're likely already using some sort of case management solution in your organization — a customer resource management (CRM) solution like Salesforce or a ticket management solution like ServiceNow, for example. Your organization has already made the investment in that system and you may be familiar with it. Sticking with the system you already have in place to manage employee relations may seem like the easiest, most attractive option. But these systems were not built to handle employee relations.



### *Documentation*

Legacy case management systems let you track various components of your employee relations process in a very linear way. But employee relations is rarely that straightforward. Creating perceived process efficiencies should not come at the expense of meeting the nuanced needs of HR. For example, a system that's designed for expediency may help you resolve an issue quickly — but it might not ensure you do it correctly.

### *Investigation*

While these systems are more secure than their basic counterparts and can handle more routine matters (Tiers 0 & 1), they cannot handle medium- to high-risk matters that are more complex, require escalation and/or demand significant expertise (Tiers 2 & 3). **The systems also do not include a guided interview process to account for multiple parties.**

The lack of a standardized process also yields less transparency, discourages employee trust and produces data that may be incomplete, inaccurate and less defensible — all of which create compliance risks.

## Reporting & Analytics

A legacy system can record details to create a database — but not necessarily in ways that offer any real insight. Case data and details are intertwined with other unrelated information, which makes finding meaningful ways to report confusing. And it's unlikely the vendor will be able to help since employee relations is not their area of expertise.

While keeping the legacy system in place for ER may seem like the path of least resistance, data you'll likely end up with is a mix of information akin to countless scattered puzzle pieces with no meaningful way to put them together.

### Key Takeaway



Legacy systems can't meet all the needs required to effectively manage employee relations:

- The system doesn't evolve, and changes may not be a priority in the future.
- The system is owned by another department that doesn't understand employee relations.

Employee relations issues were handled very differently 10 years ago than they are today. The fact is, change is a constant as employee relations continues to evolve and elevate. The systems we use must keep up with that trend.



## 3 Ethics Hotlines

Mainly focused on governance, risk and compliance, ethics hotlines are a legal requirement for public companies. While they can play an important role in employee relations, they alone cannot be used to manage employee issues.

HR Acuity's **Employee Experience Survey** revealed that only 6% of respondents phoned in their concerns, making it the least effective method of reporting employee issues. In fact, employees favor reporting to managers 30% more than reporting to HR, according to the survey.

### Documentation

Confidentiality, anonymity and security are often handled well by hotlines since they are usually administered by third parties. Nonetheless, they're more akin to a notification system — and many notifications may be missed.

As an exercise, look at the number of cases your team sees in a typical month. Then break that down by source (hotline, direct calls from HR business partners, managers, employees, etc.). This will give you an accurate sense of where your volume is really coming from.

### Investigation

An ethics hotline is nothing more than a notification tool; it cannot be used to uncover facts surrounding allegations.

Plus, with no guided investigation process to follow up, it can be impractical, even unfeasible, to ensure full compliance and mitigate risk.

### Reporting & Analytics

Only a small percentage of employee relations cases come through hotlines. Employees typically won't report lower level infractions, which means you will be left with incomplete reporting and analytics that prevent you from benchmarking, spotting trends and addressing root causes behind issues.

### Key Takeaway



According to our **Employee Experience Survey**, hotlines are the last place employees go to report an issue. This translates to gaps in your process, limited insights and an impaired ability to improve your overall employee experience.

## 4 Dedicated Employee Relations Technology Platforms

A variety of solutions exists to address employee relations specifically, but they are not all built to address the real-life complexity of employee relations. A dedicated solution should not only let you document every aspect of an issue, but also guide you through an investigation process that helps you get to the root causes of each issue. Ideally, your dedicated employee relations solution should also support employee relations best practices for permissioning and reporting while maintaining confidentiality.

Managing employee relations cases isn't always easy. Rarely do employee issues follow a set formula or straight path. The right solution will reveal what's going on in your organization through a process that is user-friendly, drives greater buy-in and creates the analytics your leadership team demands. With a dedicated technology platform, employee relations professionals have key data at their fingertips to answer executive questions and drive strategic decisions, often before they are asked.



# What are the Important *Features and Functionality* for My Organization?

Leverage this checklist to help evaluate the right software for your employee relations team.

## Conducting Investigations

- Embedded best practice tips, workflows and tools for employee relations and investigations
- Guided interview templates because what you ask is the key to what you are told
- Features designed to help your organization protect privilege, when needed
- Ability to designate involved parties as complainants, subjects and witnesses
- Auto-generated investigation close-out reports that adhere to EEOC recommendations
- Role-based permissions ensuring confidentiality and eliminating the perception of retaliation
- Governed approval and review process

## Guided Employee Relations Workflows

- Centralized repository for all documentation and evidence
- Easy and seamless collaboration with team members
- Configurable letter and communication templates
- Electronic records of documentation receipt
- Scheduled tasks to keep cases current and on track
- Ability to upload documents, regardless of file type
- Document library for easy access to most frequently used policies

## Accessing Analytics & Insights

- Ability to compare case information with benchmark data from organizations of similar size and industry
- Readily accessible predefined reports and dashboards
- Ability to track issues and trends by type, action, owner, severity, status, etc.
- User-friendly report creation
- Multi-field search, save and schedule capabilities
- Permission-based reporting and dashboards

## Permissions, Security and Confidentiality

- Role-based permissions following employee relations best practices
- Compliance with GDPR
- Single Sign On (SSO)
- Multi-factor authentication

## Training and Support

- Training focused on navigation and adoption
- Live support team available 24/7 to answer questions
- 24/7 Support Center with employee relations articles and videos

## Integrating With Other Solutions

- Seamless integration with HRIS
- Legacy system data integration to maintain historical information
- Integration with ticket management solutions and hotlines
- Integration with business intelligence solutions such as Tableau or Visier

## Key Takeaway

**After you create your must haves, break them down:**

Do you understand which technology platforms meet these needs? Do you understand the difference between the solutions available? Have you explained the value and need to your key stakeholders?

We would love to help you evaluate the right employee relations software for your organization!

Contact us at [info@hracuity.com](mailto:info@hracuity.com) to learn more.

# Build *Versus* Buy

Throughout this process, you may be considering developing an in-house solution. This may be the right option for you, under certain circumstances. Ask yourself these questions:



If you answered no to any of these questions, or simply aren't sure, then investing in an existing solution may be the better option. Not only will it save you time, but some providers have extensive employee relations expertise to help you apply tools and protocols for consistent processes and outcomes.

An existing employee relations solution will give you a stable, compliant and scalable platform that's been thoroughly tested and configured for a superior user experience — complete with comprehensive tracking, investigation and reporting features. Plus, when you use a cloud-based solution, you benefit from ongoing enhancements without having to fight for limited IT resources.

## Key Takeaway

Before investing in purpose-built technology, internal IT organizations often build the Employee Relations functionality into “general systems,” or they will recreate the existing ER workflows for them.

Unfortunately, we often hear these systems aren't nearly robust enough and become outdated quickly. IT thinks they've checked the box, and they aren't prepared to provide ongoing support.

## Making the *Business* Case

Employee relations technology is an investment that pays dividends — and it's important that your organization's key decision-makers understand not only the value of the platform but also the risk of not making the investment.

To help you make your case to stakeholders, we partnered with Forrester Consulting to uncover qualitative and quantitative benefits of employee relations technology. The fact is, things like brand reputation, brand advocacy, employee experience and productivity are all directly correlated with a strong employee relations department.

### Explaining the Value & Need

As a main user of employee relations technology, you may find yourself focusing on the many software features, process improvements and time savings that impact your day-to-day, but remember, when selling the value to your stakeholders, they need the big picture. Direct your conversation to what it means for them and the value it brings to the organization — things like ROI, ease of use and implementation, connectivity and reducing organizational risk.

Put yourselves in your stakeholders' shoes: How does an employee relations technology platform help them achieve their goals, address frustrations and ultimately make the organization a better place to work?



## Key Takeaway



Employee relations technology helps organizations deliver an average 520% ROI (or more). HR Acuity offers an **ROI calculator** that can give you an exact value for your organization.

# Selling to Your *Stakeholders*

Before you make your case, it's important that you know your audience. Each stakeholder will have different pain points and goals that motivate their decisions.

## CEO / C-SUITE

### Primary Concerns:

- Reputational risk
- Data
- #MeToo
- Culture
- Employee Experience
- Communication with the Board

### Key Benefits of Employee Relations Technology:

- Relevant analytics can be woven into strategy to ensure greater organizational effectiveness
- Employee insights and trends can help improve and direct culture
- Employee alignment around mission, vision and values
- A better workplace and more engaged workforce

## GENERAL COUNSEL

### Primary Concerns:

- Protecting the company's reputation
- Analyzing risk and consulting with leaders across the organization on ways to address it
- Managing an ethical culture

## CHIEF HR / PEOPLE OFFICER

### Primary Concerns:

- Surprise or scandal that could shine a bad light on HR or the company
- Lack of employee trust in their HR department
- Lack of insights to inform strategic talent decisions
- Having the wrong information altogether

### Key Benefits of Employee Relations Technology:

- Relevant analytics can be woven into strategy to help the HR department more effectively support company goals
- Employee insights and trends can help improve and direct culture

Note: Aligning employees with your company mission, vision and values requires employee behavioral data, not simply engagement data or employee sentiments.

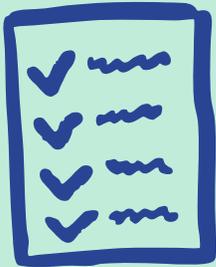
### Key Benefits of Employee Relations Technology:

- Analytics that inform risk management strategies and protect the brand
- Information that can be used to improve ongoing development and communication of workplace policies
- Insight into employee relations issues that might otherwise remain hidden

# Summary

We hope you find our Buyer's Guide resourceful as you are evaluating the right employee relations technology software for your organization. The HR Acuity team is all in when it comes to employee relations, and we are here to help answer any questions you have about HR Acuity, managing employee issues and inspiring your organization to think differently about employee relations. Please feel free to reach out to us, we would be happy to partner with you!

## RESOURCES



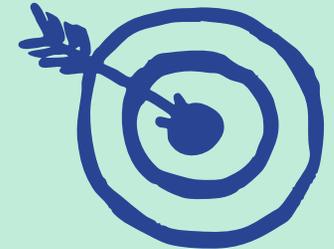
HR Acuity Buyer's Checklist



HR Acuity Overview



Forrester ROI Calculator



ER Strategy Metrics & Examples (16 KPIs)

Welcome to the *next generation* of employee relations.

### ABOUT HR ACUITY

While you can't prevent every employee relations issue, you can change how you respond. HR Acuity is the only technology platform specifically built for employee relations and investigations management. HR Acuity's SaaS technology empowers you with built-in intelligence, templates and reporting so you can conduct best practice, fair investigations; uncover trends and patterns through forward-looking data and analytics; and provide trusted, consistent experiences for your people.



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