

HRACUITY®



Employee Relations
Insights You Wish
You Had – and How
to Get Them



HARASSMENT. DISCRIMINATION. RETALIATION.

They're all happening right now in your organization.

Or maybe they aren't.

Either way, how do you know? How do you know if your people are engaging in potentially headline-making grievous acts like sexual harassment? How do you know if your employees might entangle you in a hashtagged controversy? And how do you know if people are engaging in more common infractions related to dress code, attendance, and other policy violations?

Knowledge like this is more important than ever because today's environment is filled with more risks than ever. And the best way to manage risk is to get ahead of problems before they occur. For the sake of your organization's bottom line and reputation — never mind employee engagement, productivity, retention, performance, and a host of other variables — you've got to manage employee relations the right way.

| You need clear processes for clear insights.

Except, if you're like many companies, you're still doing employee relations as if it's 1985. Maybe — maybe! — you're already achieving administrative and operational efficiency, but that's no longer enough (frankly, it never was). It's time to elevate employee relations case management to its rightful strategic place in your business, so you can gain powerful and actionable insights to help ensure compliance, protect your brand, build the culture you want, and achieve greater organizational effectiveness.



Yesterday's practices *won't address* today's issues.

Getting the most value out of your employee relations case management process begins with having an actual employee relations case management process.

One that's not just efficient but **effective and impactful.**

One that **replaces rudimentary practices** of the past with modern technology for a better future.

One that measures not just the volume of cases but **adds value to your business.**

One that **rejects the old way** for the right way.

Documentation



The Old Way: Inconsistent documentation (via generic software, spreadsheets, manual note-taking, etc.) and storage of information in drawers, hard drives, and shared files. This can lead to unsecure, missing, inaccessible, and lost data, as well as unpredictable remediation.

The Right Way: Standardized, guided processes that enable collaboration, provide appropriate levels of confidentiality and accessibility, and secure data preservation to ensure compliance and fairness of processes and outcomes.

Investigations



The Old Way: An assortment of techniques that fails to ask the right questions in the right ways to yield the right facts and details.

The Right Way: Uniform protocols, tools, and templates to help generate case reports that tell an accurate, thorough, and defensible story.

Analytics



The Old Way: With little to no standardization and consistency around documentation and investigations, obtaining useful and actionable workplace insights is almost impossible. Lack of a single data repository also fails to produce beneficial knowledge.

The Right Way: Reports based on rich data that help reveal history and patterns. Benchmarking and analysis by demographics and trends also enable getting ahead of issues through better risk management.

Modernize how you track, investigate, and analyze employee relations with HR Acuity.

Read on to discover how ditching the old approach to ER case management can yield valuable new insight into:

- + Patterns of Individual Behaviors
- + Impacts on Diversity and Inclusion
- + Partnering with Business Leaders to Drive Organizational Effectiveness
- + Trends Throughout Your Organization
- + Relationships Between Managers and Employees
- + Effectiveness of Employee Relations Professionals

Are you still using spreadsheets to document employee relations cases? Or perhaps generic software or a tracking system that spouts numbers but little else to provide context? Are you leaving it up to individual HR professionals and investigators to track issues according to their own preferences? Maybe relying on anonymous hotlines to serve as a foundation, or even a substitute, for case management?

1. THE POWER OF PATTERNS

When you manage employee relations in primitive ways, you get primitive results. You don't get all the information you need to spot trends and patterns. Detecting recurring problems with an individual employee requires a standard and consistent system of documentation and investigation. Otherwise, there's no solid way to know if an individual has been involved in work violations that are the same, similar, serious, or part of a series of transgressions.

Standardization + Consistency = Fairness of Processes and Outcomes

Without proper tracking techniques, when the person documenting or investigating a case ends up leaving your company, something else leaves, too: valuable data. If you're lucky, that person may have kept electronic records, but that information needs context that only a highly guided process can enable. In other words, you can't complete a puzzle if you're missing its pieces.

FOR EXAMPLE:

Suppose a client won't do business with you anymore because of your salesperson's inappropriate comments about the client's female staffers. When you look into your company's records, you discover that he'd been previously reported a few times for similar misconduct targeted at his fellow co-workers. However, it wasn't clear what, if any, steps were taken to address the problem, other than a note indicating that he was put on notice. You also see that this employee has moved around a lot in the company over the past few years.

If you had a centralized database of information built upon a guided, standard, and consistent approach to interviewing and investigating, you would be able to view a trail of behavior. More important, you would've been able to act upon it earlier to prevent this employee from doing harm to both external and internal stakeholders.

[Achieve greater standardization and consistency with HR Acuity.](#)

2.

TELLING HIDDEN STORIES



Detecting patterns of individual behavior is certainly useful, but such insights are mere chapters in a larger story about the goings-on in your organization. It's a narrative that only a comprehensive approach to employee relations case management can tell.

Do certain departments suffer from more employee complaints than others? Have there been spikes in policy violations or performance problems? Are certain groups, like women or people of color, increasingly raising issues? Is union activity brewing?

The right system will enable you to aggregate data based on a variety of factors and demographics to uncover truths and trends across your company. As a result, you'll be better able to address cultural concerns, policy updates, leadership issues, and other matters.

An effective employee relations case management solution reveals otherwise untold stories in your organization.

FOR EXAMPLE:

Imagine your customer-service department is experiencing increases in absenteeism. The reason? Employees are calling in sick.

The real reason? Unless you're asking the right questions in the right ways and logging answers appropriately, you'll never know. Maybe people really are getting sick. Or maybe there's a new manager in the department who's driving down morale. Plus, how does attendance compare with other departments? Only a full, properly documented examination of the issue can tell you for sure and enable you to benchmark with confidence.

[Spot trends and patterns at your company with HR Acuity.](#)

3.



BANISH BIAS, INCREASE INCLUSION

A total view of employee relations throughout your organization can also enhance compliance and guard against disparate (adverse) impact — that is, when a seemingly neutral policy has an unintentional discriminatory effect. (This is different from disparate treatment discrimination, treating an employee unfairly due to membership in a protected class such as race, gender, national origin, etc.)

Adverse impact is almost never obvious, but almost always preventable with the right data.

Disparate impact can manifest in many ways, like if your criteria for promotions inadvertently favors men, or if downsizing eliminates people of color or older workers at higher rates. In these and other instances, having the right employee relations structure, content, and tools can help you determine the best actions to take — who should be promoted, laid off, etc. — both from a compliance and an organizational effectiveness perspective.

FOR EXAMPLE:

Let's say you're facing an EEOC charge of gender discrimination initiated by a woman who was recently terminated. To begin with, you must turn over complete records not just about the employee but also related to your decision-making process for the termination. With the right employee relations documentation, you can show that the woman was either fired for just cause or part of a downsizing based on seniority, performance, or other defensible reasons.

At the same time, you might also supply defensible data showing that men were treated similarly and terminated based on the same criteria. But even more significantly, you can use this information to go beyond compliance and foster a culture of diversity and inclusion by making sure all workers receive fair treatment.

Create a more [inclusive environment](#) in your organization with HR Acuity.

A large, stylized green number '4' followed by a small green dot, and a green plus sign to its right.

THE MOST IMPORTANT RELATIONSHIP IN YOUR COMPANY

Your organization, like every organization, faces struggles between managers and employees. What you need is the right system to reveal why such tensions arise. Given that there's no workplace relationship more important than that between a manager and a direct report, it's vital to document issues in ways that can identify root causes and inform lasting solutions that will ultimately lead to better performance.

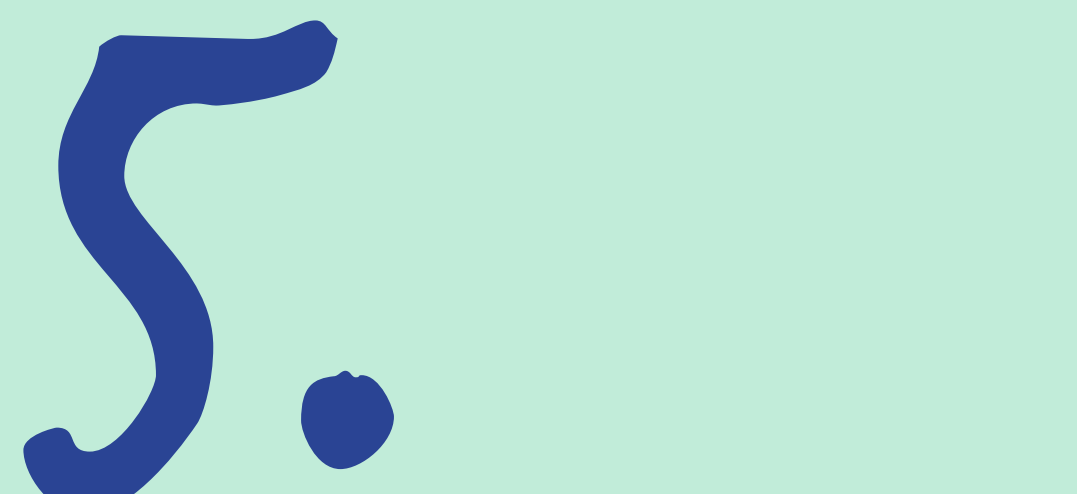
The right employee relations solution doesn't just document issues, it helps improve them.

FOR EXAMPLE:

Suppose an employee repeatedly violates your company's travel and expense rules. Despite multiple conversations with his manager, he continues to breach policy. For starters, it would help to document incidents properly so that any subsequent conversations will be based on facts rather than subjective recollections. Additionally, you could — and should — integrate that documentation with a performance evaluation in ways that allow more holistic, objective feedback.

[Bolster performance at your company with HR Acuity.](#)

Perhaps the greatest benefit of employee relations done right is the opportunity to forge partnerships with business leaders to deliver greater value companywide. Weaving employee relations analytics into other HR and business functions enables executives to see a more complete story. Better still, it empowers them to make more strategic decisions to meet their objectives and run their departments more effectively.



5. BEYOND EMPLOYEE RELATIONS

Learning and development, performance management, risk management, diversity and inclusion, succession planning, workforce planning, employee engagement, retention, corporate social responsibility — there's no shortage of areas to apply information gained through proper analysis of employee relations data.

Employee relations is not just about employee relations. It's about adding value across your entire business.

Is your compliance training effective? Do employees need to grow certain skills or behaviors? Are there gaps in your policies? Are you developing the right people for leadership positions? Even if you think you already have the answers to such questions, then ask: *Are you sure?* A consistent approach to tracking, investigating, and analyzing employee relations cases will help you find the answer.

FOR EXAMPLE:

Suppose you have a high percentage of accounting employees making mistakes. As a result, you take corrective action with them, only to see too many workers resign. But were you to gather information in a systematic way, you could tap into data to decipher a root case — you might see that a number of disputes are related to inexperienced managers who are uncomfortable delivering feedback. Consequently, you might implement training to develop skills in those supervisors and subsequently reduce turnover.

Or imagine that before putting employees on performance improvement plans (PIPs), you offer the option for them to leave voluntarily with severance. A standard and consistent approach to employee relations will supply you with data to see if enough, and what kinds of, employees are accepting the offer — as well as reveal what sorts of employee behaviors lead to PIPs in the first place.

Build meaningful partnerships with business leaders throughout your business with HR Acuity.

6. ER FOR EMPLOYEE RELATIONS

The right technology and processes. Yes, they can help you do employee relations better, but make no mistake: They are not, cannot, and should not be the foundation of employee relations at your company. So what is? People. Specifically, the employee relations and HR professionals responsible for tracking, investigating, and analyzing cases and data.

Managing employee relations is only as good as the people managing employee relations.

The right system shouldn't just yield information to manage employee relations better — it should also provide data to manage employee relations professionals themselves. It must supply insights that help you monitor workload, gauge performance, and audit whether people have the ability to do their jobs correctly and consistently. (All of which can guard against pressure from stakeholders who might seek to influence investigations.)

FOR EXAMPLE:

During an audit of investigations over the past year, you notice that many cases are taking too long to close. To understand why, you survey your investigators. Unfortunately, their responses indicate a variety of reasons with no discernible trends.

However, with the right technology solution, you could examine whether steps in your investigation process are taking too long (and whether that's acceptable), as well as if people are adhering to procedures meant to enhance efficiency. Armed with such data, you can make informed decisions about improving a number of methods.

HRACUITY®

You can't prevent every employee relations issue.

But you can control how your organization responds.

Achieve consistency in the way you track, investigate, and analyze with **HR Acuity** — the employee relations case management solution. We empower you with structure, content, and tools around documentation, investigations, and analytics in ways that provide accurate, reliable, and uniform experiences for your people. All with software that equips you with built-in expertise to make best practice your process.

Let us show you what we can do for your organization.

Visit hracuity.com/demo.

