NEXTGEN HR AND PAY

Employee Requirements Playbook

November 2018

"We're putting the employee at the centre of all that we do."

Alex Benay, Chief Information Officer of Canada, Associate Deputy Minister

OVERVIEW OF THE EARLY ENGAGEMENT WORSHOPS

NextGen HR and Pay

The Government of Canada is exploring options to acquire a modern and flexible Human Resources (HR) and Pay platform to better support the future public service workforce. Supporting this critical initiative, the NextGen HR and Pay Team is working to define the future state user experience for the Government of Canada's next generation HR/Pay capability. As such, the NextGen HR and Pay Team has adopted a user focused approach in determining the differentiating requirements, future state capabilities and user experiences required for a modern HR/Pay platform.

To begin to assess user needs, the NextGen HR and Pay team engaged Ernst and Young, who utilized a design thinking approach to facilitate multiple employee engagement workshops. The workshops, were held over ten weeks, across the country, and engaged key stakeholders from across government (i.e. Managers, Employees, Payroll and Compensation Advisors, Field Workers, HR Specialists, etc.). The workshops focused on uncovering current end-user system experiences across the user experience spectrum from critical pain points (hassles) to positive experiences (delights), as well as to define the art of the possible (imagine ifs). In addition, stakeholders assisted in reviewing, revising, and providing key input to the program purpose, guiding principles and end-user personas. For context, personas are characters which represent groups of people, specifically employees, workforce segments, or user groups.

The output from these sessions is summarized in this Playbook with two accompanying videos. The Playbook summarizes the differentiating HR/Pay user needs and end-user experience capabilities while the videos provide a format to experience the future system requirements, the future HR/Pay selection process and key stakeholder messaging.

Canada

SECTION 1

Engagement Approach

OVERALL ENGAGEMENT APPROACH

NextGen HR and Pay

NextGen HR and Pay Workshops were underpinned by EY's proven design thinking methodology as a framework to define the workshop approach while holding focus on the needs of the diverse end-users from the retiree to field worker to HR/pay specialist.

In the Fall of 2018, with the NextGen HR and Pay Team, EY facilitated six employee, end-user focused workshops with a broad cross section of public servants. The workshops were hosted in Ottawa, Vancouver and Halifax and focused on gathering critical insights to the current HR/Pay systems and aspirations for the future solution.

Each workshop consisted of four key objectives:

1. **Validate the future HR/Pay platform's purpose statement and guiding principles**
2. **Identify what a world-class digital employee experience means to the public service**
3. **Validate HR/Pay end-user personas, identify critical system hassles and delights**
4. **Document future HR/Pay solution(s) differentiating requirements from an end-user perspective**

To ensure that the end-user was driving the definition of the future state user experience, key personas were defined. These personas are valuable in recognizing that different employees, workforce segments and user groups have different needs and experiences that must be considered in the end solution.

To aid in the HR/Pay system procurement and employee engagement process, two key illustrative videos were also developed. The videos provide a fresh perspective and are designed to bring to life the voice of the employees and their desired experiences.

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DETAILED WORKSHOP APPROACH

NextGen HR and Pay

In order to provide a representative cross-section of public servants, the workshops were hosted across the country, including Halifax, Ottawa, and Vancouver, and each included approximately 25 stakeholder participants. To ensure representation from the variety of end-users, participants varied in age, demographic, Government of Canada years of service, department, and roles.

The workshops focused on 5 areas to inform key differentiating HR/Pay system requirements and end-user experience capabilities.

1 Considered the employee lifecycle

2 Considered world-class digital employee experiences

3 Validated the purpose statement and guiding principles

4 Identified and validated key stakeholder personas

5 Identified hassles, delights, and imagine ifs...

Canada

HOW WE IDENTIFIED THE HASSELS, DELIGHTS, AND IMAGINE IFS

Identified Government of Canada's key end-user stakeholders and built personas to represent them.

Defined the impactful end-user experiences (hassles and delights) across the employee lifecycle and determined how these translate to a differentiating requirement.

Using EY's design thinking methodology, participants discussed the art-of-the-possible (imagine ifs) for stakeholders in specific segments of the employee lifecycle to identify opportunities for an exceptional and effective user experience.

Canada

WORKSHOP ARTIFACTS

NextGen HR and Pay

THE THEMES THAT EMERGED

Process
automation

Simple and Intuitive
user experience

Advanced
reporting and analytics

Remote
and offline reporting

System Training
and support

Data Visibility
and transparency

Guiding Learning
within system

Master System
single system of record

Seamless Integration
between modules and
periphery systems

Innovation
voice recognition
and AI
technologies

Access to
consistent
information and
document sharing

Ability to Tailor
solution by department

Data Validation
controls, checkpoints and
timelines

**Omnichannel
Capabilities**

Canada

DESIGN THINKING OVERVIEW

Design Thinking is a defined method to identify the root causes and solution of a question asked, allowing for new insights to be gained. The methodology is a design way of thinking which creates an extreme target that is not bound by any current limits or obstacles. It involves reframing the perceived problem or challenge, and gaining perspectives, which allows for a more holistic look at the path towards preferred solutions.

The NextGen HR and Pay Team leveraged EY's design thinking methodology to keep the following lessons learned top-of-mind:

1. **Empathy of the user**
2. **Design with the user, not for the user**
3. **Redefining the problem can lead to dramatically different outcomes**

Canada

IMPORTANCE OF DESIGN THINKING

NextGen HR and Pay

BETTER PERFORMANCE

5%
increase in employee engagement
correlates to 0.7% increase in operating margin

94%
of the worlds most **admired organizations** said that engaged employees is a source of competitive advantage

MORE INNOVATIVE

87%
less likely to leave **if you're engaged**

4% Less
increase in employee engagement
correlates to 0.7% increase in operating margin

3x More
The **likelihood of employees** staying in a **purpose driven organisation**. They are also **1.4x** more engaged

ADVOCATES

87% Less
likely to leave **if you're engaged**

67%
Engaged employees advocate their organization compared to those who are disengaged

74% of Generation Z
agree that business has a responsibility to create a **better world**

WANT TO STAY

Canada

SECTION 2

Engagement Deliverables

SECTION 2a

Purpose Statement + Guiding Principles

NEXTGEN HR and PAY PURPOSE STATEMENT:

An **adaptive HR solution(s)** that will **put the user at the centre** and will enable the delivery of a **modern service experience** to potential, current and former public servants.

To ensure the delivery of **exceptional service** to Canadians, the **end-to-end HR capability** will enable the Government of Canada's people strategy, and **support the workforce of the future.**

GUIDING PRINCIPLES FOR DELIVERING OUTCOMES

NextGen HR and Pay

User-Centric
design

Integrated Solution
that enables
seamless operations

Master System
single system of record

Accessible to All
end users regardless of
language, location, or ability

Simple Self-Service
that provides 24/7
access

Enables
the optimization of
business processes

Supports
our future way
of working

Meets Digital
security, privacy and
architecture standards

Supports a Strong
employee culture

Timely
adaptive and flexible

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SECTION 2b

Employee Lifecycle

GOVERNMENT OF CANADA HR BUSINESS REFERENCE MODEL

NextGen HR and Pay

The NextGen HR and Pay team developed a draft Government of Canada HR Business Reference Model as the foundation upon which to build the workshops. Key HR functional areas were mapped to priority process and system functions.
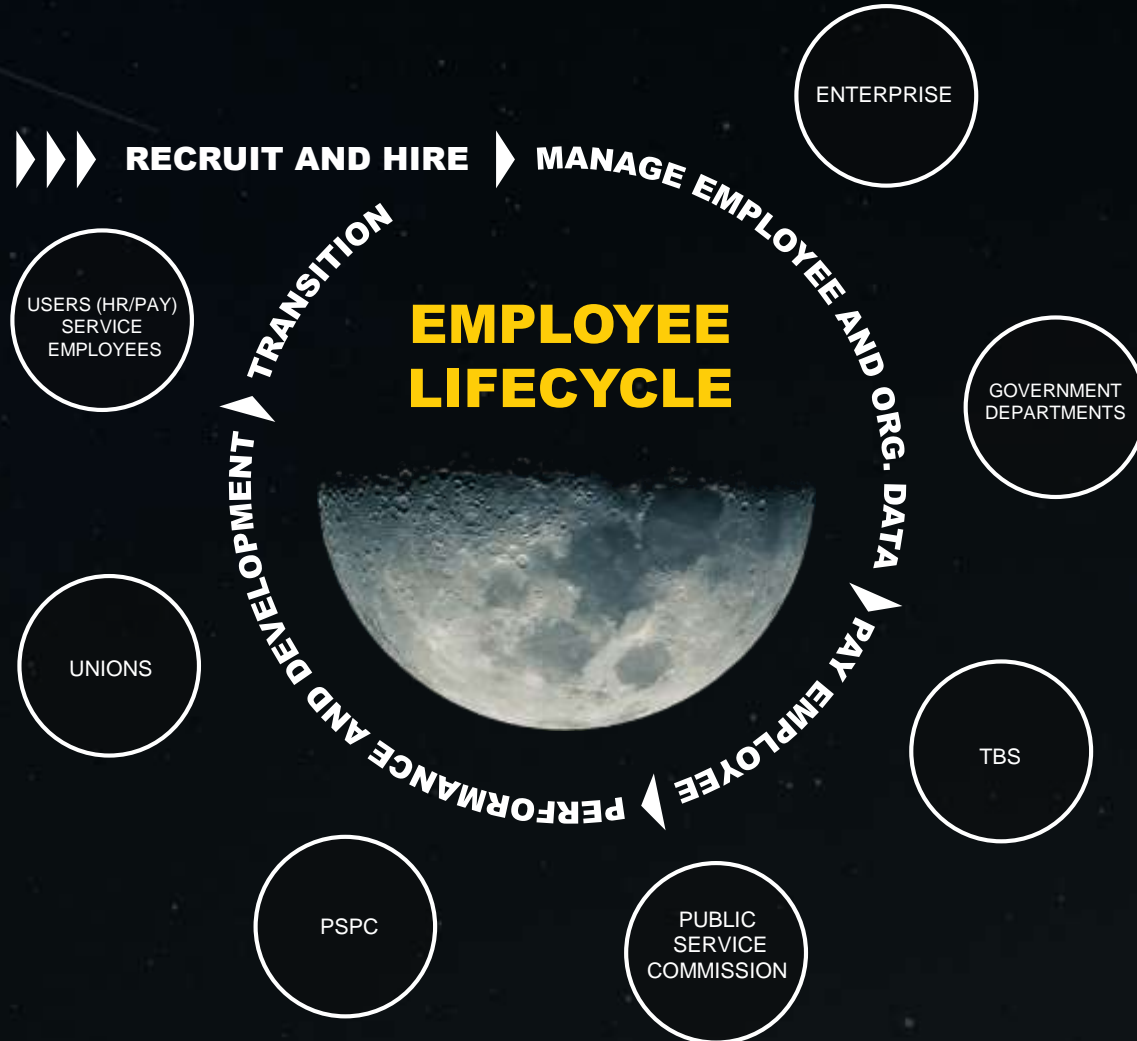
EMPLOYEE LIFECYCLE

NextGen HR and Pay

Diagram showing the Employee Lifecycle cycle with phases: RECRUIT AND HIRE, MANAGE EMPLOYEE AND ORG. DATA, PAY EMPLOYEE, PERFORMANCE AND DEVELOPMENT, TRANSITION. Surrounding stakeholder circles: ENTERPRISE, GOVERNMENT DEPARTMENTS, TBS, PUBLIC SERVICE COMMISSION, PSPC, UNIONS, USERS (HR/PAY) SERVICE EMPLOYEES.

The employee lifecycle phases encompass the stages of an employee's time in an organization from recruitment to transition (including retirement, transfers and former employees rejoining the public service).

The high-level breakdown of the employee lifecycle has been summarized below across five process areas:

1. **Recruit and hire**
2. **Manage employee data**
3. **Pay employees**
4. **Performance and development**
5. **Transition**

Managing all aspects of the employee lifecycle is a critical HR function as each of these process areas leave a lasting impression of the experience that prospective, current, and former public servants have with the Government of Canada.

Enabling transparent and efficient HR/Pay process enabled by technology will provide employees and end-users with the appropriate level of visibility throughout their career lifecycle, while providing HR the opportunity to operate more strategically.

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HR PROCESSESS HEAT MAP

Using the employee lifecycle and corresponding process functionalities, key priority functionalities for a future HR/Pay solution were identified. This was aligned to the draft Government of Canada HR Business Reference Model.

RECRUIT AND HIRE

Establish recruitment and sourcing strategy
Document employee data
Develop selection criteria
Assign company property
Analyze and create job posting requisition
Perform employee orientation
Post job/position
Manage new hire activities
Manage the talent pool
Screen and track candidates
Select candidate
Prepare job offer
Perform employment due diligence

MANAGE EMPLOYEE DATA

Initiate job change request
Establish and maintain org. structure
Manage year beginning planning
Manage benefit enrollment
Process employee personal data change
Establish and define positions during annual budget cycle
Perform year-end evaluating
Administer flexible spending accounts
Manage leave of absence
Establish and define headcount outside of budgetary cycle
Maintain ongoing demand
Administer disability claims
Monitor leave of absence
Create position
Process benefits terminations
Manage return from leave of absence
Identify jobs and job descriptions
Perform benefits reporting
Manage employee file
Edit position
Maintain eligibility
Data stewardship
Determine and monitor open positions
Exchange data with providers
Manage mass organizational changes
Manage provider payments
Manage employee life events

PAY EMPLOYEE

Manage merit increase process
Payroll compliance: Ops and Config Mtce
Create work schedule
Manage employee annual incentive plans
Coordinate payroll with third party institutions
Allocate work schedule
Manage long term incentive plans
Post to GL
Process leave request
Conduct annual market pricing
Generate year end payment summary
Collect daily time and attendance
Treasury funding
Audit time and leave data
Process wage attachments
Edit time and attendance data
Payroll adjustments
Process time and attendance data
Process separation payment
Send the time data to 3rd party vendor
Maintain employee payroll data
Employee time data maintenance
Unclaimed disturbances
Process reversals
Data exchange inbound
Data exchange outbound
Process and distribute on/off cycle
Assign costing allocation

MANAGE PERFORMANCE AND DEVELOPMENT

Assess new training needs
Manage goals
Maintain qualification catalog
Prepare for succession planning
Assess existing training courses/curriculum
Conduct performance appraisal
Evaluate employee profiles
Identify high potentials
Develop and amend course type
Calibrate ratings
Update employee profiles
Perform consensus assessment on talent
Communicate training information
Administer 360 feedback
Conduct talent audit and identify succession gaps
Manage self-enrolment for all courses
Administer performance improvement plans
Tracking and evaluation
Manage employee pre-book request
Monitor and execute succession management
Manage group course enrolment
Manage employee initiated waitlist
Manage course cancellation request
Deliver training
Appraise courses
Reimburse education
Tracking external employee training
Create individual learning plan

TRANSITION

Process voluntary employee separation
Process involuntary employee separation
Process reduction-in-force
Perform exit interview
Collect company property

■ Map to HR Business Reference Model

■ Additional to include based on feedback

Canada

EMPLOYEE LIFECYCLE REQUIREMENTS

Each phase of the employee lifecycle contains a number of sub-processes representing key functional areas that were considered as part of the definition of requirements.

RECRUIT AND HIRE

- Manage recruitment
- Manage hire, onboarding, and integration

MANAGE EMPLOYEE AND ORGANIZATIONAL DATA

- Perform employee data administration
- Manage organization and positions
- Manage workforce planning
- Manage Compensation and benefits
- Classification
- Manage acting and movements

PAY EMPLOYEES

- Manage compensation
- Manage payroll
- Manage time and leave
- Manage Pension administration

TRANSITION

- Manage employee separation
- Manage Workforce adjustments

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EMPLOYEE LIFECYCLE: A JOURNEY FROM HIRE TO TRANSITION

NextGen HR and Pay

RECRUIT AND HIRE
1 — Manage Recruitment
2 — Manage Onboarding and Integration

MANAGE EMPLOYEE AND ORGANIZATIONAL DATE
Manage Onboarding and Integration
3 — Perform Employee Data Administration
4
5 — Manage Workforce Planning
6 — Manage Benefits and Pension

PAY EMPLOYEES
7 — Manage Compensation
8 — Manage Time
9 — Manage Payroll

MANAGE PERFORMANCE AND DEVELOPMENT
Manage Employee Development Training
Manage Competency
10
11 — Manage Performance
12
13 — Manage Career and Succession Planning

TRANSITION
14 — Manage Employee Transition

Canada

SECTION 2c

Personas

PERSONAS DEFINED

Persona #1

Persona #2

Persona #3

Personas are characters that represent different groups of people (i.e. end-users), more specifically, employees, workforce segments, or user groups.

Personas are valuable as they can assist in recognizing that different employees, workforce segments and user groups all have different needs and expectations. They help us to understand their wants, experiences, behaviors and goals. When using personas for defining system(s) requirements, we identify unique needs and hassles experienced in their current environment.

PERSONAS APPROACH

To understand the diverse needs of the Government of Canada end-users, the NextGen HR and Pay team sought feedback through discussions, and the workshops, and has iteratively developed and defined personas.

Upon completion of the workshops, the following key personas were identified, defined and used as the basis for creation of the future state user requirements: Field Worker, New Employee, HR Specialist, Compensation Advisor, and People Manager.

Additional personas identified included: Retiree, Security Administrator, Labour Relations, Newly Bridged Employee, Financial Specialist, and Union Representative.

The persona stories developed for this playbook, though fictional, are a culmination of various personal details and experiences shared with us by the workshop participants.

Canada

PERSONAS DEFINED

FIELD WORKER

Name: Sandeep Jha
Location: Vancouver

NEW EMPLOYEE

Name: Drew Li
Location: Ottawa

COMPENSATION ADVISOR

Name: Martha Jacobs
Location: Gatineau

HR SPECIALIST

Name: Krishna Joshi
Location: Ottawa

MANAGER

Name: Quinn Lam
Location: Vancouver

NextGen HR and Pay

LUCAS MARTIN

Role: Union Representative
Location: Vancouver

BRAYDEN CHAN

Role: Newly Bridged Employee
Location: Calgary

RAPHAEL PAQUETTE

Role: Labour Relations
Location: Ottawa

TANNER BERGERON

Role: Retiree
Location: Halifax

JASE WILSON

Role: Security Administrator
Location: Gatineau

MARY LEVESQUE

Role: Finance Specialist
Location: Toronto

SECTION 3

Personas + Employee Requirements

PERSONA #1

"Location, location, location! The majority of our jobs are located outside our Capital – you can work on land, air, or sea."

Sandeep is a 33 year old government employee who works in British Colombia as a Parks Warden. He holds an undergraduate degree in Outdoor Recreation Management from Simon Fraser University and holds a Class 5 Driver's License. Understanding the importance of physical fitness, Sandeep wakes up every morning at 5:00am for a 20km bike ride before work and enjoys the outdoors.

In his role, Sandeep is responsible for facilities maintenance, delivering, monitoring and reporting on assigned recreation, conservation and extension services and activities. He is also the field contact for park visitors and contractors, and is dedicated to protecting visitors and resources, enforcing compliance with the Parks Act and other statutes and rules.

FIELD WORKER

Name: Sandeep Jha
Location: Vancouver

FIELD WORKER
RECRUIT AND HIRE

THEMES

1 Data visibility
and transparency

2 Omni channel capabilities

3 Store and forward – remote
and offline access

4 Simple and intuitive
user experience

5 Master system of record

REQUIREMENTS

I have the ability to view and search internal job postings relevant to my level and experience

I can view an onboarding checklist on an employee landing page, and clearly review what's expected of me in my role. The onboarding tasks should be straightforward and online

My letter of offer is accurate. Ideally, I can review and sign the offer on my mobile phone, tablet, or through a variety of other channels

I can complete assessments offline. These assessments are automatically uploaded to the system as soon as there is an internet connection

I can set up career alerts based on my skills and interests and will be automatically notified when a position opens up

My new employee record is easily created from the information I've supplied during the recruitment process, and my new employee record is pre-populated using the record created during the recruitment process

FIELD WORKER
MANAGE EMPLOYEE + ORGANIZATIONAL DATA

THEMES

1 **Simple and intuitive user experience**

2 **Omni channel capabilities**

REQUIREMENTS

I have access to review and update my personal data (emergency contact, personal information, and banking information) in the future solution to ensure those details are correct are maintained

I should have the ability to review checklists of activities (paperwork completion, required readings, mentor assigned, tour of office, etc.) that I need to complete as part of this process and receive notifications if they are not completed in a timely manner

I should be able to attach supporting documentation as required by HR through my computer, tablet or phone, so that they can be reviewed and validated

I can update my benefits enrollment online or through an app as necessary

FIELD WORKER

PAY EMPLOYEE

THEMES

1 Access to consistent Information and document sharing

2 Process automation

3 Data visibility and transparency

4 Omni channel capabilities

REQUIREMENTS

▶ I have the ability to see when my managers and teammates are taking time off so I can plan accordingly

▶ I have the ability, in real-time, to check my paid time off balance

▶ I can access my total compensation statement and compensation change statement to validate for accuracy

I have the ability to see my accurate paystub with YTD calculations on the day I am paid. Historical paystubs should also be available

▶ I can request a leave of absence or time off from my job through a variety of different mediums, including mobile, tablet, and offline capabilities

FIELD WORKER
MANAGE PERFORMANCE + DEVELOPMENT

THEMES

REQUIREMENTS

1 — Simple and intuitive user experience

> I can easily add jobs to my profile I may be interested in so I can have meaningful conversations with my manager

2 — Data visibility and transparency

> I can add in goals for any defined period – monthly, quarterly, or annually

3 — Process automation

> I can easily request feedback from my peers, and managers through mobile, or offline, and then have the system capture it at a later date

> I can easily rate courses I have completed so the course owner and administrator can determine whether the learning is valuable or not

4 — Master system of record

> I can easily track my external and internal training, my employee record is complete and up to date. My manager will have a clear picture of what I am working on

5 — Access to consistent information And document sharing

> I can easily see learning content and course offerings based on my preference and role

FIELD WORKER
TRANSITION

THEMES	REQUIREMENTS
1 Data visibility and transparency	I have the ability to access historical pay records on an as-needed basis
2 Master system of record	I have access to my employee record if I transfer to another department
3 Process automation	I have my off-boarding or transfer tasks clearly stated on my landing page where I can validate that I have completed all tasks required of me I should be able to initiate transfer through the system
4 Simple and intuitive user experience	I can fill out a survey or complete an exit interview online if I am unable to attend in person, and provide my feedback to the department
5 Seamless integrations between modules and periphery systems	I can initiate my retirement process in the system , which will automatically trigger other workflows

PERSONA #2

"I joined because public services are undergoing a major change to build a culture which encourages innovation, new ideas and approaches, better collaboration and engagement."

Drew is a young professional with one year of work experience. After completing his degree in Political Science from Carlton University, Drew joined the Community Management Office at the Treasury Board of Canada Secretariat. His role as a Junior Program Officer requires him to provide support to ensure employees have the skills, knowledge, and competencies they need, and to help implement various policies and manage the government's assets and acquired services.

Drew hopes the job will give him regular income and career growth, however he worries that his lack of experience may restrict him from meeting his manager's expectations. He is currently single, and living at home with his older brother and mother in Kanata, just outside Ottawa. On weekends Drew likes to walk his dog, Fizzy, along the canal, and go on hikes with his friends.

NEW EMPLOYEE

Name: Drew Li
Location: Ottawa

NEW EMPLOYEE
RECRUIT AND HIRE

THEMES

1 **Process automation**

2 **Data visibility and transparency**

3 **Simple and intuitive user experience**

4 **Seamless integrations between modules and periphery systems**

NEEDS

▶ Once I have accepted my letter of offer, the system will automatically send me all the forms I need to complete before I show up to work on the first day

I have the ability to refer a candidate for a position posted externally, and have the referred candidate receive an invitation to apply to the posting. Should the candidate be hired, the system should link the referral and automatically pay me a one time bonus referral fee

▶ I know who my new manager will be, and I can read about expectations as a new employee in the department, and can reach out to my manager to schedule a meeting / coffee chat before my first day

▶ I can see the status of my job application on the portal right away, and if I have questions about the status, I know who to reach out to

▶ I can complete all my language assessments online, and have those records travel with me automatically if and when I move departments

NEW EMPLOYEE
MANAGE EMPLOYEE + ORGANIZATIONAL DATA

THEMES

1 Process automation

2 Omni channel capabilities

3 Access to consistent information and document sharing

4 Master system of record

5 Remote and offline access

NEEDS

▶ I can make changes to my personal data which will trigger notification to HR

▶ I can manage my benefit enrollments through my phone

I can submit claims online through a web portal or through my phone

▶ I can pull an organizational chart up in real time to see different positions throughout the department, and have contact information for each employee

▶ I have one core employee profile which encompasses all of my information and it moves with me throughout my career

▶ I can see my own leave and vacation entitlements whether I am at home, in the office, or elsewhere

Canada

NEW EMPLOYEE
PAY EMPLOYEE

	THEMES		NEEDS
1	**Remote and offline access**	▶	I have access to my pay information through my mobile, tablet, or at home at any time
2	**Seamless integrations between modules and periphery systems**	▶	Pay increases should be seamless including when I am promoted or am in an acting position
3	**Data visibility and transparency**	▶	I have an electronic paystub that is easy to understand and accurate
4	**Guided learning within the system**	▶	I have access in the system to documents or links which help me understand my paystub or pay information
5	**Simple and intuitive user experience**	▶	I can easily enroll in my benefits through a variety of different channels, and be automatically notified when I ready for enrollment

Canada

NEW EMPLOYEE
MANAGE PERFORMANCE + DEVELOPMENT

THEMES

1 Access to consistent information and document sharing

2 Process automation

3 Innovative technologies/ machine learning

4 Simple and intuitive user experience

5 Data visibility and transparency

NEEDS

I have the ability to track and maintain my own action plans (including learning and development plans) in order to identify gaps in my current skill set and experience

My resume is automatically updated when I complete a course or training (knowledge, skills, abilities, education). My profile will be complete. accurate and available for future opportunities

I can easily understand how my skills and competencies compare to the requirements of roles so I may tailor my individual development plan in order to meet the requirements of a new role or promotion

I can request feedback from peers, managers and colleagues and have it available for my manager to view at any time

I can initiate my own development plan

NEW EMPLOYEE
TRANSITION

THEMES

NEEDS

1 **Master system of record**

I can see my payroll and pension information in one place

If I transfer to another department, my original employee record should follow me

2 **Process automation**

I receive my Record of Employment (ROE) within 5 days, or as per local employment standards when I transition out of an organization

3 **Data visibility and transparency**

When transitioning, I should have no interruption in pay, and my new manager will automatically see pertinent information prior to my first day

PERSONA #3

"We are basically playing a game without any rules."

Martha, a self declared Key Performance Indictor (KPI) junkie, is a Compensation Advisor. At 32 years old, she has just returned to work from maternity leave. Martha's role is to assist in resolving cases related to pay.

Martha has taken to creative workarounds when resolving her cases. She worries about not being able to do enough to help employees who are affected, and although she has only been back at work for 2 months, she is already finding it challenging to keep up.

COMPENSATION ADVISOR

Name: Martha Jacobs
Location: Ottawa

COMPENSATION ADVISOR

RECRUIT AND HIRE

THEMES

1 Data visibility and transparency

2 Seamless integrations between modules and periphery systems

3 Process automation

4 Data visibility and transparency

NEEDS

▶ I will receive complete compensation packages and employment agreements for review and approval before being sent to the candidate

The position/job requisition workflows are streamlined and the proper approval and notification steps are in place. Ability to escalate as necessary throughout the workflow

I will be automatically notified when a new candidate signs a letter of offer, and have compensation details available in order to set up the employee record in advance of their start (salary, bonus, performance award)

▶ Connect departmental hiring needs to workforce planning and departmental staffing budgets

▶ The key pieces of identification (i.e. Social insurance number) and banking information are auto verified by the system and monitored for accuracy and completion

▶ I have access to the employee record and can see relevant details about pay, salary, etc.

Canada

COMPENSATION ADVISOR

MANAGE EMPLOYEE + ORGANIZATIONAL DATA

THEMES

1 **Seamless integration between modules and periphery systems**

2 **Process automation**

REQUIREMENTS

I can calculate and pull reports on group term life insurance, employee pension plan deductions, pension plan contributors, and taxes based on an employee's total earnings in the pay period, including manual payments

I am automatically notified when a new employee enters their banking information into the system

Canada

COMPENSATION ADVISOR

PAY EMPLOYEE

THEMES	REQUIREMENTS
1 Process automation	I have the ability to process lump sum termination pay in addition to an employee's final regular pay cheque
	I have the ability to determine, apply and remit garnishments for employees
	I have the ability to initiate pay against the necessary pay types / codes through direct deposit
2 Data validation controls, checkpoints and timelines	I have the ability to set up and process recurring deductions
	I can generate and simulate a regular and off-cycle payroll run
3 Seamless integration between modules and periphery systems	I can pay employees using multiple pay rates
4 Data visibility and transparency	I will receive triggers and notifications when changes to an employee status may impact payroll
	I have ability to update the wage rate at any point in a pay period, including shift premiums / premium payments

COMPENSATION ADVISOR
MANAGE PERFORMANCE + DEVELOPMENT

THEMES

1 Data visibility and transparency ▶

2 Seamless integration between modules and periphery systems ▶

REQUIREMENTS

I have the ability to view and conduct calibrations for employees in real time, within a specific department, location, or employee job / role

I have the ability to compare performance across departments to ensure ratings are established consistently and distributions are standard across the organization

I have automated integration of performance ratings with the overall compensation program for specific ratings to generate specific bonus payments and annual increases

Canada

COMPENSATION ADVISOR

TRANSITION

	THEMES		REQUIREMENTS
1	**Data validation controls, checkpoints and timelines**	▶	I can adjust final pay for any vacation owing for employees transitioning to another location or out of the organization
2	**Advanced reporting and analytics**	▶	I can report on the date of terminations in order to prevent overpayments for employees leaving during an off cycle pay week
3	**Process automation**	▶	I have the ability to calculate termination payments based on department, union rules and statutory requirements
4	**Master system of record**	▶	I have the ability to pull up active employee records or archived employee records, in accordance to statutory requirements by geography, location, and department

PERSONA #4

NextGen HR and Pay

"You have the opportunity to build a career in the public service by tapping into networks, on-the-job training, mentoring programs, job mobility, and other career development tools. We support life-long learning – we even have our own Canada School of Public Service to help you develop throughout your career."

Krishna is easy going and always on the lookout for leading practices. She wants to make a difference for her organization. Krishna understands that hiring top talent is a major challenge. She does not want to miss out on quality hires and understands the loss of productivity and costs associated with hiring mistakes. Krishna loves spending time with her family and friends, but has a tendency to always say yes when asked to help resulting in late work nights.

Krishna's goals include recruiting, retaining, inspiring, and engaging top talent. She dreams of a day when she can streamline the recruitment process and reduce unnecessary administrative work. While she does not have the chance to attend many conferences, she loves to read industry blogs and reliable HR news sources. She is also part of an HR community Slack channel.

HR SPECIALIST

Name: Krishna Joshi
Location: Ottawa

HR SPECIALIST
RECRUIT AND HIRE

THEMES

1 Advanced reporting and analytics

2 Innovative technologies and machine learning

3 Omni channel capabilities

REQUIREMENTS

I have access to a dashboard every day with recruitment analytics including but not limited to:

- Compare prior year to current year – eg. # of staff, time to fill, time to hire, source of hire, first year attrition, quality of hire, hiring manager satisfaction, candidate job satisfaction, applications per opening, cost per hire, selection ratio, candidate experience, offer acceptance rate, application completion rate, recruitment funnel effectiveness, sourcing channel effectiveness, sourcing channel cost, etc.

I can help support candidate questions through a live chat session on our Careers website

I can easily distinguish internal versus external candidate profiles and can filter, view and evaluate internal candidates first

I can review candidate profiles using a mobile phone, tablet, and / or computer, as well as any type of online browser

HR SPECIALIST
RECRUIT AND HIRE CONT'D

THEMES

4 **Access to consistent information and document sharing** ▶

REQUIREMENTS

I have the ability to search my existing candidate pool for potential new hires to fill a job requisition or role

There is a common recruitment database that is available to all departments with the capability to search for candidates that have been part of the hiring process or have been identified as internal candidates

HR SPECIALIST
MANAGE EMPLOYEE + ORGANIZATIONAL DATA

THEMES

REQUIREMENTS

1   **Master system of record**

▶ I have the ability to use a unique employee identifier in order to maintain a single employee file and record history for every employee irrespective of geography, location, department, manager, etc.

I have the ability to maintain an employee record with the following fields: multiple hire dates (re-hire, transition from contractor to FT, etc.), title, tenure, pay band, location using geography, different active statuses, business department identifier, employment status, performance rating, employment equity information, and unlimited user defined fields

2   **Advanced reporting and analytics**

▶ I have the ability to collect and maintain extensive employee data including but not limited to: Preferred name, Language of preference, Education, Past experience, Training, Background / credit check info, Compliance training, Employment equity demographics, Employment status – part time / full time / casual/temporary, Position management (title, department, cost center, reporting manager, approval authority manager, pay band, lines of business), dependents and emergency contacts

HR SPECIALIST

MANAGE EMPLOYEE + ORGANIZATIONAL DATA CONT'D

THEMES

3 Data visibility and transparency

4 Data validation controls, checkpoints and timelines

REQUIREMENTS

▶ I have the ability to associate multiple managers to employee files

▶ I have the ability to track location of employees, to capture duration of temporary re-location and the implication of tax perspectives based on the regional tax legislation and rules

I have the ability to maintain employee records for seven years following an employee's termination or in accordance with local employment standards

I have the ability to segregate and control access and user permissions to sensitive employee data

HR SPECIALIST

PAY EMPLOYEE

THEMES

1 Data validation controls, checkpoints and timelines

2 Simple and intuitive user experience

3 Seamless integration between modules and periphery systems

REQUIREMENTS

▶ I have the ability to generate: employee paystubs, forms for tax filing, and ROEs

I have the ability to trigger alerts for any changes in employee status for payroll

▶ I have the ability to automatically push employee paystubs through to ESS on their pay date

▶ I have the ability to assign multiple pay rates or codes to employee time

HR SPECIALIST
MANAGE PERFORMANCE + DEVELOPMENT

THEMES

1 Access to consistent information and document sharing

2 Seamless integrations between modules and periphery systems

3 Data visibility and transparency

REQUIREMENTS

I have the ability to conduct a detailed search of people profiles to identify potential candidates as possible successors for key positions

I have the ability to broadcast to a specific employee population that a course is available so that registration increases

I have the ability to add external training, document hours and confirm approval processes to an employee record

I can link individual learning plans to specific learning courses to ensure targeted learning delivery

I have the ability to link performance and development goals to corresponding Learning Management System learning courses / materials

I have the ability to determine workflows, define review cycles, push notifications, and survey creations

HR SPECIALIST
MANAGE PERFORMANCE + DEVELOPMENT CONT'D

THEMES	REQUIREMENTS
4 Data visibility and transparency	I have the ability to analyze / manage talent and succession pipeline for specific leadership roles across a department or across the entire organization

I have the ability to set organizational goals from the top and have them cascade down to individual contributor positions |
5 Innovative technologies and machine learning	I have the ability to search for courses within a curriculum and set them to become available to the user if pre-requisite criteria is met
6 Process automation	I can print off the review for completion, and upload into the system at a later date
7 Master system of record	I have the ability to pull development items into a development plan in order to view and update all at the same time

HR SPECIALIST
TRANSITION

THEMES

1 Advanced reporting and analytics

2 Data validation controls, checkpoints and timelines

3 Data visibility and transparency

REQUIREMENTS

I have the ability to report on date of terminations to prevent overpayments for employees leaving on a non-payroll week

I have the ability to track multiple termination reasons including: voluntary, involuntary, death, disability, retirement, job change, health reason and other defined reasons

I have the ability to track benefit termination dates and have system notifications come up as reminders

I have the ability to maintain future, immediate, and retroactive dates for all terminations or transitions

I have the ability to send triggers automatically to finance, IT, and other areas of the organization to ensure employee access is terminated at the appropriate time

I have the ability to notify payroll to process severance pay and whether lump sum or salary continuation is applicable and for how long

PERSONA #5

"Our strength is the diversity of our people and the ideas they generate – the tools we use to get there are critical to our success."

Quinn has recently been promoted to Director at Royal Canadian Mounted Police. She now oversees a team of 15 people and is comfortable with providing feedback and career development consultations.

Quinn loves to exercise and has initiated a steps-challenge amongst her team, which has also lowered the team's cost of benefits expenditure by 5%. She loves a bit of competition and always brings a happy, "no complaining, no matter what" attitude to work.

Quinn is concerned about some of the people on her team who are long over due for promotion. She worries specifically about a few employees being flight risks if they're not promoted soon. With no resources to backfill unexpected departures, she worries about the capacity of her team to take on the extra workload. Taking her promotion seriously, she decides to try to look for skill development courses that would allow her team to further their careers.

PEOPLE MANAGER

Name: Quinn Lam
Location: Vancouver

PEOPLE MANAGER
RECRUIT AND HIRE

THEMES

1 Process automation

2 Data visibility and transparency

REQUIREMENTS

I have the ability to schedule and send invites for interviews bi-directionally, and when I do, the system should automatically remind the candidate via email or text message

I can view / edit / trigger action on specific candidates within a list of candidates for a role

I have the ability to flag / shortlist candidates for the next stage in the recruitment process (eg. Interview or assessment), which is accessible to the staffing assistant or recruiter helping with the requisition

I can generate lists of candidates who have applied to the same role within a specific time frame historically

I can easily view or be notified of when candidates have accepted their letter of offer, and see in real time where the new employee is in their onboarding

Canada

PEOPLE MANAGER
MANAGE EMPLOYEE + ORGANIZATIONAL DATA

THEMES

REQUIREMENTS

1 Data visibility and transparency

▶ I can automatically be notified of employee contracts which are expiring within my team, so I can action them ahead of time

I have the ability to track changes on an employee's record, including expiration of appointment, dismissal, layoff, suspensions, disciplinary actions, leave without pay, terminated during probation, and other reasons

2 Master system of record

▶ I can store documentation about an employee electronically and attach it to their employee core record

3 Data validation controls, checkpoints and timelines

▶ I have the ability to review and extend a contract extension request so that the correct employee contracts can be extended ahead of time

4 Seamless integration of modules and periphery systems

▶ I have a system which integrates with time and attendance including absence management, for reporting and analysis purposes

Canada

PEOPLE MANAGER

PAY EMPLOYEE

THEMES

1 Data visibility and transparency

2 Seamless integration of modules and periphery systems

3 Master system of record

4 Data validation controls, checkpoints and timelines

REQUIREMENTS

I have the ability to view salary benchmark information in the system

I have the ability to view employee work history and attendance information, as well as scheduling for accommodated roles and/or acting assignments

I have the ability to trigger annual bonus, merit increases and LTIP entitlement calculations based on department, individual employee and components of individual performance

I have the ability to track ongoing medical notes, evaluations, instructions, restrictions, modified duties and other changes in assignments, including ability to attach associated documentation to employee records

I have line of sight into leave of absence requests from my employees so I am included in the overall process and am able to approve / deny requests and delegations

Canada

PEOPLE MANAGER
MANAGE PERFORMANCE + DEVELOPMENT

THEMES

1 Advance reporting and analytics

2 Data visibility and transparency

3 Simple and intuitive user experience

REQUIREMENTS

▶ I need a manager dashboard to summarize information related to the management of my team, including highlights of performance analytics, flight risk employees, retirement risks, job criticality, readiness, and other factors

▶ I have the ability to view, in real time, actions my employees are taking towards personal development

I have the ability to track on the job training and assessments for my employees

I have the ability to cascade development goals throughout my team so that individual goals are aligned with departmental goals

▶ I have the ability to update performance plans and development plans with my employees throughout the year

Canada

PEOPLE MANAGER

MANAGE PERFORMANCE + DEVELOPMENT

THEMES

REQUIREMENTS

1 **Process automation**

▶ I have the ability to facilitate the entire performance management process, including but not limited to: creation of individual development plans and goals, document feedback and conversations, monitoring progress, roll up of approvals and integration of results to talent assessment and succession planning process

PEOPLE MANAGER
TRANSITION

THEMES

1   Data validation controls, checkpoints and timelines

2   Data visibility and transparency

REQUIREMENTS

▶ I should be able to review and approve separation or transition requests initiated by my employee

I have the ability to review and approve transfer requests from an employee from my department to another, and have automatic notifications remind me to do so if I do not complete it in an allotted time frame

▶ I have the ability to receive information about any severance packages which have been created for my direct reports

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SECTION 4

Key Findings and Recommendations

KEY FINDINGS AND RECOMMENDATIONS

NextGen HR and Pay

Throughout the workshops we challenged participants to think beyond what they know today and challenged them to consider the art of the possible. This resulted in the need to look at all facets of HR/Pay – the operating model, governance, policy and regulations, as well as process. The following summarizes some of the observations made throughout the engagement which need to be considered as part of the overall program design and implementation:

- Not every department is the same. Look for similarities and standardize where possible. Recognize the differences and design future processes with the end-user at the center.

- Understand the end-user (i.e. personas) and align on governance, program structure, communication and engagement to drive the selection of systems and tools to enable digital HR/Pay.

- Improve transparency across departments and solutions to assist in the seamless and hassle-free movement of public servants. Records need to move with people and this should be in real time.

- Balance standardization and centralization with the complexity of the Government of Canada and take a practical approach. Review and challenge pay rules and policies. Is there an opportunity to align changes with this program?

- Lean, action-oriented, authorized governance with enterprise-level authority is crucial to success. Cannot make decisions in departmental silos – need enterprise-level integrated governance and leadership.

- Look at this program as an opportunity to simplify and modernize at every level. Do not be constrained by the existing way of doing things. Look at legislation, hiring practices, competition rules, and approach to collective agreements, and target operating model to determine if there is a simpler way of working.

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KEY FINDINGS AND RECOMMENDATIONS

NextGen HR and Pay

Consider future HR/Pay through three lenses: People, Process and Technology. The right balance is critical to long-term success.

PEOPLE: END-USER (PERSONAS)

- Bring back the human into human resources. Make HR and Pay personal closer to the end user. The point isn't to automate everything, but to automate what makes sense so that people can help people when it matters.

- Provide access to the solution through a wide range of technology (mobile, tablet, computer, AI assisted IVR) at any time, from any location.

- Serve up contextual help intuitively. Provide guided learning within the system.

- Reduce the number of support touchpoints through the use of natural language chatbots and artificial intelligence.

- Provide a similar technology experience that consumers expect from other services (e.g. Amazon, retail banking, etc.)

Canada

PROCESS: POLICY AND OPERATING MODEL: HR/PAY REQUIREMENTS

- Breakdown silos to enable efficiency of process, approvals and data flow across departments and throughout employee lifecycle.

- Simplify processes and eliminate unnecessary steps.

- Think through authorizations and streamline wherever possible. Push decision making down to the lowest logical level and avoid duplication.

- Each department has unique complexities that may not be candidates for standardization or centralization; review with a central design and consistent way of working in mind but allow for some justified variations to adjust for unique departmental processes.

- Timeliness. Reduce prior period adjustments by ensuring data and workflows are designed with attention to the interdependencies between people, process and technology. A balance of all three is critical in optimizing workflow, eliminating bottlenecks and containing system extensions/customizations.

- Access to accurate, real-time data will empower public servants to make decisions at key points during the hire to transition process reducing workflow bottlenecks.

- Eliminate paper-based forms and leverage self-service where possible to improve efficiency, time and cost.

Canada

TECHNOLOGY: TECHNOLOGY AND DATA

- Enter employee data once. Interoperability throughout the HR/Pay process, seamlessly between systems.

- Use advanced workflow to reduce processing time, accelerate decision making, and automate processes to the extent possible.

- Ensure completeness and accuracy of data at the point of entry through system validation rules, workflow checkpoints, and Blockchain.

- Data visibility and transparency for end users (ability to see their own information) as well as across the enterprise.

- Enable simple and intuitive self-service wherever possible.

- Where feasible, take advantage of machine learning and artificial intelligence to streamline processes, and decision making.

- Deploy advanced reporting and analytics early in the process. Provide meaningful insights to facilitate real-time decision making, support and troubleshooting.

- Deploy in a phased and incremental approach (no big bang).

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WHAT DOES THE FUTURE LOOK LIKE

NextGen HR and Pay

We understand the current state. How do we combine today's technology with the rapid advancement in digital HR/Pay?

USING DESIGN THINKING TO UNLOCK THE FUTURE STATE

CURRENT STATE	FUTURE STATE
Support is not readily available.	Keep it personal. Bring back the human.
Transactional, siloed processing of data.	Digital first. Seamless integration between HR/Pay solution(s) and sending/receiving systems.
Paper-based, manual processing of complex rules and workflows.	Digital HR/Pay with automated workflows. Real-time decision making.
Technology forced to fit with old processes.	Leverage leading practices within technology tools to simplify processes. User centric design enabled through technology.
Inconsistent data. No established system of record.	Once and done approach to employee master data. Consistent approach to data entry.
Multiple entry points to access data and collateral across the employee lifecycle.	Landing portal that can be accessed through a wide range of technologies, available 24x7 from anywhere.

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WHAT DOES THE FUTURE LOOK LIKE CONT'D

NextGen HR and Pay

We understand the current state. How do we combine today's technology with the rapid advancement in digital HR/Pay?

USING DESIGN THINKING TO UNLOCK THE FUTURE STATE

CURRENT STATE

Not all users have the same ability to access technology due to their unique personal and workplace needs.

Simple requests require a number of cumbersome steps.

Limited visibility to data hinders work performance and user experience.

Repetitive, low value tasks are highly time consuming and decrease productivity.

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FUTURE STATE

User focused, "one-stop-shop". Improve the experience for users who do not have regular access to technology. Make it accessible to all regardless of ability, experience, and comfort level.

Immersive user experience through contextual help, natural language chatbots.

Increased transparency and access to role-based information. Ensure employees have access to their own data.

Cognitive technology(s) can help streamline repetitive HR functions (e.g. AI for recruiting), RPA for processing etc. to free up high-touch human capacity for what matters.

SECTION 5

Conclusion

CONSIDERATIONS

NextGen HR and Pay

As the GoC continues down the path of selecting a solution(s) to support future HR/Pay:

- Clearly defined and communicated accountability. Alignment from the Minister down to the project team will be critical in rebuilding trust and credibility. Need a single integrated governance model that spans both stabilization and the NextGen program to manage the many interdependencies and priority setting.

- Continue to engage the end user. Provide a mechanism for the workshop participants to continue to help shape the requirements. They will become your advocates.

- Establish government-wide vision and strategy for hire to transition experience, while accommodating flexibility to departments to fine tune the methodology within the framework.

- Create opportunities for employees to connect across the government (e.g. leading practice sharing, learning, training, etc.)

- Take a hard look in parallel to the technology selection process at how government can simplify its legislative framework. Take a more strategic approach to collective bargaining, and challenge the old way of working.

- Invest in building a high performance team, with a blend of internal and external talent and experience to drive the program forward.

- Brand the program and use it to showcase a new way of working.

- Make the Stabilization team part of the new solution and not have them operate in a silo. We strongly suggest an integrated governance model led by the business owner.

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THANK YOU!