

Re-engineering HR Service Delivery for a Global Financial Services Company

In today's complex HR environment, effective service delivery is crucial for managing a global workforce efficiently. A leading provider of risk and benefits solutions, managing over 28,000 colleagues across multiple countries, recognized the need to improve the delivery of HR Services to colleagues. Growing business demands and regional expansion called for a revamp with scalability in focus, to streamline current processes and enhance user experience across all locations.

Serving millions of people globally, the customer's workforce is sized proportionally. Additionally, the customer has grown rapidly through several business expansions and acquisitions across 80 countries. This has resulted in a disconnected HR Service Experience that isn't consistent across locations due to a myriad of business units using their own HR Processes, Resources and Technologies.

Tailoring the HR Processes to the needs of each business sprouted challenges in consistency and HR experience. The HR department was tasked with navigating through these problems. As the customer scaled, the basic processes that HR utilized with email, hundreds of phone numbers and basic case management struggled to keep up.



Seeing how a subsidiary of the customer had dealt with the same problems and achieved a unified high-performance solution with ServiceNow, they partnered with INRY to re-engineer their global HR service delivery process and tools.

A problem defined, is a problem half solved

INRY conducted a comprehensive platform assessment for Customer through a series of focused workshops. The assessment examined multiple aspects of their implementation including service delivery processes, knowledge management, security configurations, SLA structures, reporting capabilities, and user adoption patterns. INRY's consultants evaluated both technical and operational elements, analyzing everything from portal usage metrics to regional service variations.

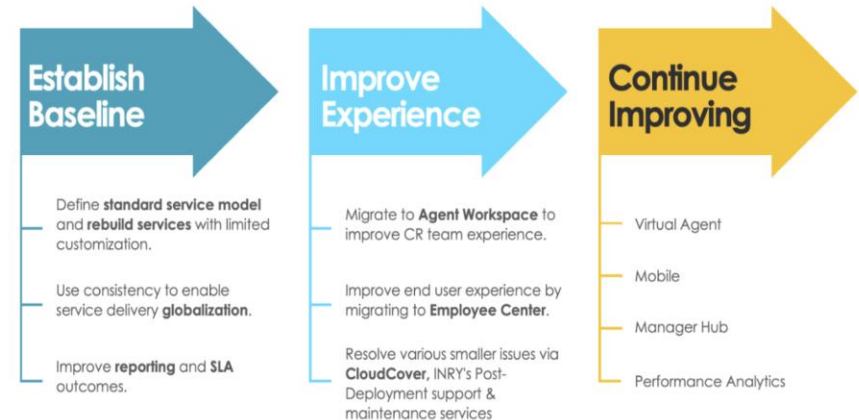
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The assessment specifically looked at how effectively the platform was serving Customer's 28,000 colleagues across different regions, integration with other systems like Workday, and the overall user experience for both HR agents and employees. Few of the key challenges identified were:

- **Low Platform Adoption:** Only 2,000 monthly portal views from a population of 28,000 colleagues. Knowledge article utilization was minimal despite available content.
- **Service Management Issues:** Service configurations were inconsistent across regions
- **Inefficient Processes:** Incorrect ticket categorization affected service delivery and stale tickets were accumulating without proper cleanup procedures.
- **Change Management Gaps:** Significant lack of proper user training and adoption strategies and limited success in driving self-service adoption
- **Limitations in Reporting and Analytics:** Performance Analytics configuration was incomplete, the customer faced difficulty in case deflection rates, and challenges in measuring service effectiveness across regions.

- **Limited Scalability:** Current configurations were heavily customized, restricting the customer's ability to expand HR service delivery to additional countries and regions.

INRY recommended a three-pronged approach to address these challenges:



Delivering on What Was Recommended

INRY led a strategic transformation of the customer's HR service delivery landscape. The deployment of Employee Center Pro (EC Pro), a modern self-service portal, unified HR resources and support channels into a single, intuitive interface. INRY enhanced reporting capabilities by implementing custom dashboards and analytics tools, giving leadership

unprecedented visibility into service performance, resource utilization, and operational trends. To ensure sustainable success, INRY conducted extensive knowledge transfer sessions and hands-on training workshops, building internal capabilities among HR administrators and power users. The implementation followed INRY's proven PASS methodology, enabling rapid value delivery through controlled, iterative deployments while focusing on long-term scalability and standardization.

Key Processes Implemented:

1. Case Management Optimization

- Streamlined case lifecycle management with automated routing and assignment rules
- Implemented multi-level approval workflows for complex requests
- Created efficient case transfer protocols with maintained context and history
- Established clear resolution paths with documented procedures

2. Enhanced Case Support Framework

- Developed comprehensive case documentation standards
- Implemented real-time SLA tracking and notification system
- Integrated automated survey distribution for case resolution
- Created knowledge article suggestion system during case creation
- Built feedback loops for continuous knowledge base improvement

3. HR Process Standardization

- Designed standardized templates for common HR tasks
- Created dynamic checklists for complex HR procedures
- Implemented automated response workflows for routine inquiries
- Established consistent documentation practices across regions

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4. Portal Enhancement

- Deployed intuitive service catalog with categorized HR services
- Implemented smart search functionality for knowledge articles
- Created personalized user dashboards based on roles and regions
- Integrated virtual agent capabilities for immediate support
- Built mobile-responsive design for anywhere access

5. Advanced Analytics and Reporting

- Developed role-based dashboards for different stakeholder needs
- Created real-time HR case tracking and trending analysis
- Implemented leadership scorecards with KPI visualization
- Built custom reports for regional and global performance metrics

- Established automated reporting schedules for key stakeholders

Each process was designed with scalability and best practices in mind, allowing for future expansion while maintaining consistent service delivery standards across all regions.

The Road Ahead

With a solid foundation, the customer is now well-positioned to expand their HR Service Delivery globally. The addition of EC Pro enhances colleague satisfaction by providing seamless access to HR resources. Businesses across all 80 countries now experience a consistent and unified experience that is quick, efficient and comprehensive. The holistic analysis and targeted solutions for each of the pain points ensures consistency, fairness, and transparency for both employees and managers. With quick and efficient access to HR support, employees can dedicate more of their time to advancing the organization's mission and deliver better care to their customers. Future phases will focus on deploying additional capabilities, such as **Agent Workspace**, to further optimize service delivery.

INRY's ongoing support through **CloudCover** ensures sustained adoption, platform enhancements, and operational excellence, paving the way for the Customer's long-term growth and innovation.