

Self-Service - What is Real?

REALTIME SELF-SERVICE IS REAL HARD, AND IT'S REALLY IMPORTANT TO KNOW WHETHER YOUR PROVIDER'S REALTIME REALLY IS. BY NAOMI LEE BLOOM

In my first column, I wrote about the importance of having an outsourcing provider's platform deliver intelligent, content- and business rule-rich self service, as opposed to dumb, transaction-only self service. While few would disagree with the importance and desirability of self service and embedded intelligence, there are some important nuances in how these capabilities are provided.

Does the outsourcer provide every employee (or this could be a contingent worker or even a position seeker) and manager/leader with the same capabilities or are those capabilities personalized to recognize the specific employee or manager as well as the multiple concurrent and/or serial work roles that they are playing? Does what an employee or manager gets change automatically when they change work roles and/or such other relevant characteristics as marital status (e.g. to offer different health care options), or do you or your outsourcing provider have to intervene manually to associate new capabilities with the employee or manager at that point? Does what each user gets depend on the current, past or future effective date of the period to which their business event applies or is all the embedded intelligence, including content and business rules, presumed to be current?



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When your outsourcing provider's HRM delivery system is fully effective dated, it means less cost, and faster response time.

At the heart of these questions is the extent to which the provider's platform is:

- Role-based in its delivery of self service, security and workflow, including the embedded intelligence which should be a part of that self service, thereby recognizing each user in terms of both work roles (which could be multiple, both concurrently and serially) and personal characteristics (e.g. length of service, marital status, gender, age, etc.) and deploying system capabilities based on this information; and

- Effective-dated in its construction, and not only of self service.

There's too much to cover here for one column, so I thought I'd begin with effective-dating and then cover role-based, personalized self service, security, and workflow in my next column.

Throughout the HRM business and, therefore, in the software that supports HRM, we must deal with historical data (what were the eligibility rules for a particular health plan when you submitted a claim under it?), retrospective processing (what did you earn during the particular pay period in question?), retroactive processing (what would you have earned if the new salary schedule had gone into effect on its effective date rather than not being decided upon until two months later?), current data (how many POSITION offers are outstanding as of today?), and prospective processing (what will be the impact of the proposed change in health care plan costs?). Software that can handle elegantly (i.e. accurately and without manual intervention) all of these different chronological perspectives -- generally referred to as effective-dated -- has a number of common characteristics:

- Every relevant row (and this implies having VERY well-modeled data designs -- but that's a topic for yet another column) in a physical relational table (or relevant object in an object data base) is described by effective date(s) where these dates (and the associated time of day) are based upon Coordinated Universal Time and processed with a date handling technique that allow for (1) breaks in time; (2) insertions to correct history (while noting insertion date, i.e. distinguishing between the effective date and the actual date that a row or object was created); (3) "full" (within practical limits) automatic retroactive processing to include the ripple effects of intermediate data and/or business rule changes; and (4) the ability to reposition the data base (including all associated reference data and business rules) for analysis as of a specific date or elapsed time period.


- Even though some tables or objects could function without effective and/or correction dating (used to

preserve the audit trail of changes), there is consistent treatment of all tables, which is much easier to explain and to support than having different patterns of effective dating.

- Default dates are used wherever possible to make effective-dated software user-friendly, e.g. by presuming, except where this doesn't make business rule sense (e.g. for a proposed employee start date in an offer letter), that today's date is the effective date/start date and that there is no end date for each action or business rule unless an end date is given.

- All the software, or individual components, is able to operate as of some future date (i.e. to model a future state, e.g. of an organizational change or a proposed total comp plan change) or, more commonly, calculate and account for/distribute the effects of a retroactive change with payroll impacts. Retroactive payroll capabilities involve knowing what was, calculating what should have been, and addressing all of these changes in the current period.

- The software can process any retroactive, current and/or future-dated events against the business rules (including all edits) and data that are or were or will be applicable for the event's effective date, including future-dated events that are waiting to take effect

Translated into plain English, these capabilities allow you to carry out normal business functions when it's important for them to occur rather than at any artificially set point in time, e.g. on pay period start or end dates. These capabilities allow you to ask questions about the past, current or future state of the business against the same software and database that are processing last month's payroll and implementing a change to benefit plans which will take effect next month. When the automated components of your outsourcing provider's HRM delivery system are fully effective-dated, far less manual intervention is needed on anyone's part to run the HRM business -- and less intervention means less cost, fewer errors, and much faster response time. 

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