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Accelerate HR digital transformation

Think outside the box with HXM system integrations for mid-sized organizations

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Accelerate HR digital transformation

The new HR environment requires better technology. HR teams have always dealt with complicated processes and constant, competing demands from leadership and employees. But today's HR landscape is more complex than ever, for multiple reasons:

- The rise of remote work.

- High demand for skilled workers and resulting race for talent.

- Shrinking budgets and economic uncertainty.

- Ever-growing employee expectations for optimized technology with intuitive user experiences.

- Increasingly stringent, evolving regulatory demands related to health and safety, discrimination, the privacy of employee information and more.

Building an agile, digital HR platform is one of the top nine imperatives that can help HR leaders ready their organization for the future.[1]

HR leaders are under intense pressure to streamline HR processes, strengthen compliance and enhance employee satisfaction. Achieving these goals requires a solution that brings digitized employee documents together with employee data in a single, secure platform that is easy to access and use for HR teams and workers alike.

1 Komm, Asmus, Pollner, Florian, Schaninger, Bill and Sikka, Surbhi, The new possible: How HR can help build the organization of the future. McKinsey. (March 12, 2021)

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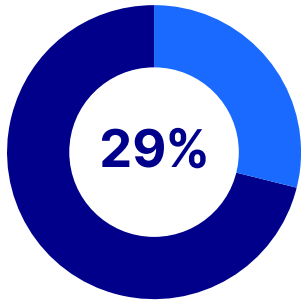
Did you know?
29% say they would be somewhat or very willing to take a new job if the only difference from their current job was better devices, applications and productivity tools.[2]

Why is HR digital transformation so critical?

Business performance has always depended heavily on the strength of an organization's human capital. The empowered, increasingly digital workforce expects consumer-like HR experiences that deliver anytime connectivity, simplicity, personalization and convenience. On the other side, HR teams need digital-first processes and systems to keep up with flexible work models.

Having the right technology and flexible work environments are now critical for attracting and retaining talent.

But with manual, inefficient processes and disjointed tools in their day-to-day work, finding time to address the needs of today's modern workforce becomes that much more difficult for HR teams.

In this guide, you will learn how integrating SaaS HR document management technology with HXM systems like SAP® SuccessFactors® can accelerate HR digital transformation, support talent retention and help combat resource limitations. You will also learn about:

- The latest information management challenges affecting HR functions.
- The benefits advanced HR content management can deliver.
- What to look for in an employee document management solution.

Start with smarter information

HR processes are drastically affected by the maturity of HR content management within the organization. HR teams, employees—and even candidates—face disruptions, frustration and risks if these processes fall short.

Employees and candidates expect seamless digital experiences from organizations. Without frictionless processes, many are quick to find more meaningful work experiences elsewhere. For HR professionals, administrative drudgery takes away time that should be spent on building strategies to deliver the meaningful experiences that existing and potential employees seek.

To optimize HR processes and improve HR document management, the best place to start is with smarter information delivered through SaaS content management tools and processes.

The challenges of HR content management

HR content management includes all the processes involved in creating, capturing, managing, accessing, securing, storing and disposing of employee and candidate information—whether it is paper or digital—across the HR spectrum.

2 S&P Global, Distributed work: 5 changes that will redefine HR's role and responsibilities. (2022)

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The central challenges of current HR content management methods include:

Multiple, disconnected tools for document creation, file storage and archiving.

Manual, paper-based legacy systems and processes.

Lack of visibility of employee documents.

Limited resources due to shrinking budgets and economic uncertainty.

These challenges lead to a wide range of consequences, which can have a significant impact on an organization's bottom line, such as:

- Wasted time and reduced productivity due to time spent searching for employee information across repositories.
- Higher HR operating costs due to inefficient processes.
- Security risks with paper-based employee information and uncontrolled content.
- Higher potential for human error in handling confidential information.
- Compliance difficulties in scattered, non-secure documents.
- Negative impact on the employee experience (for example during onboarding) due to lack of access to key HR information and documents, especially for remote employees.

Benefits of advanced HR content management

Successful content management enables HR leaders to increase efficiency, reduce costs and minimize security and compliance risks. While separate tools on the market offer these advantages, products that unite all benefits in one seamless solution will maximize your HR digital transformation.

Advanced HR content management improves the experience of HR team members and employees by:

- Reducing time-intensive manual HR processes.
- Improving accuracy and efficiency with automation while simplifying compliance.
- Providing HR, employees and managers with easy, secure access to HR documents and information.
- Boosting employee and candidate satisfaction and engagement with personalized communications.

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Did you know?

Hyper automation provides tremendous opportunity to improve HR technology efficiency and reliability, particularly across transactions and workflows that are subject to errors, bottlenecks and delays.[4]

Succeed with the right tools and the right strategy

Another essential capability for HR content management is integration with leading human experience management (HXM) solutions. Systems that integrate user interfaces for simplified access for HR team members and employees not only boost efficiency but also allow organizations to enhance existing HXM investments with advanced technology that supports HR digital transformation now and in the future. These solutions should also synchronize with role-based permissions to control document access while generating personalized, accurate, consistent HR content using integrated employee data.

With the right HR content management solution, organizations can address immediate process challenges and prepare for the evolving demands of modern work. The ability to adapt quickly and integrate modern technologies into HR processes is critical to helping organizations master modern work.

To deliver an immediate impact, with room to expand and evolve as needs change, organizations must seek out solutions that enable HR teams to:

- Implement intelligent automation that streamlines processes and reduces human errors.

- Easily manage complex HR compliance obligations.

- Deliver personalized digital communications for an improved experience.

- Ensure security and privacy of confidential employee information.

- Automate processes to free up valuable HR time, reduce errors and ensure required documents are properly filed and available when and where they are needed.

Key requirements for HR content management

A growing number of HR content management solutions are on the market, but the most advanced, future-ready solutions address crucial needs such as:

1. Employee document management
2. Document generation and upload
3. Security, retention and compliance management

The next sections of this guide provide a deeper dive into these key requirements, including the benefits of finding the right solutions to address these needs.

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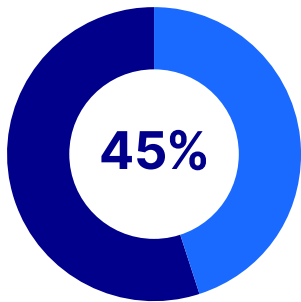
Did you know?

45% of HR leaders say their employees are fatigued from all the change related to digital transformation, economic uncertainty and political tensions.[5]

1 **Improve employee document management**

Employee files are often scattered in multiple systems, making it difficult to locate employee documents, control access, respond to audits or apply retention policies. This creates the risk of compliance-related fines and incurs costs in time, paper storage and file recall. Paper files are at risk of fire, flood, theft, loss and unintentional access. Employee document creation is often manual, time consuming and error prone, which can result in a poor employee or candidate experience.

Empower HR to accelerate employee-focused processes and deliver improved employee experiences with document management solutions that integrate with your existing HXM software. This allows organizations to gain a complete view of employees and ensure files are easily accessible when and where employees need them, while maintaining secure and compliant control over sensitive information.

Benefits for HR professionals

- Centralized access to digital employee documents
- Simplified security and compliant file management
- Efficient, agile and responsive HR Shared Services model
- Automated document processes
- Improved productivity

Benefits for employees

- Personalized communications
- Engaging experiences through digitized workflows
- Fast and easy access to personal documents at any time
- Ability to create required personal document quickly and easily

Benefits for candidates

- Engaging hiring experiences through digitized workflows
- Fast, seamless and error-free offer letters
- Increased transparency for all onboarding documents upon hire
- Simplified and frictionless acceptance processes
- Positive first impressions and confidence in the organization's ability to offer engaging employee experiences

An effective employee document management system must:

- ☑ Seamlessly integrate with existing HXM systems, such as SAP SuccessFactors.
- ☑ Digitize and manage employee documents in a secure, integrated central repository.
- ☑ Leverage full-text search for instant retrieval to improve searchability and findability of information.
- ☑ Deliver alerts for missing and outdated documents to improve efficiency.
- ☑ Provide employees and candidates with easy, secure access to HR documents to reduce process friction.
- ☑ Automate processes to free up time for HR and recruiters to focus on more strategic initiatives.

Real-life example

Reducing costly errors and improving HR response times at a global medical device company

As an SAP SuccessFactors customer since 2015, a global medical device company relied on SAP SuccessFactors Employee Central, Recruiting, Learning, Performance & Goals and Compensation modules in its HR department. The organization used Microsoft® SharePoint®, file systems and paper to manage employee records, resulting in multiple manual steps and many data errors. It needed an employee records management solution with full integration to SAP SuccessFactors. Since implementing OpenText™ Core for SAP® SuccessFactors®, an employee document management solution, the HR department has automated record filing, sped up routine HR tasks and safeguarded the accuracy of transferred information. HR is faster and better informed in its response to employee requests.

Learn more

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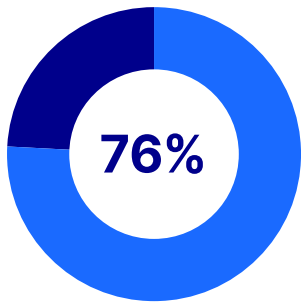
Did you know?

76% of organizations say that their HR processes are at least 75% manual.[6]

2 Automate and simplify document generation and upload

HR teams need more time to focus on employee engagement and retention in an environment of high turnover. Manual HR processes are cumbersome, error-prone and inefficient, slowing productivity and putting retention and recruitment efforts at risk. HR teams are competing for the best talent in a very crowded and competitive marketplace. Manually managing records and documents slows the process and can mean losing current or prospective talent. Speed interactions with employees and candidates through automated processes.

Automating HR processes simplifies document generation and upload, empowering HR teams to focus on more high-value, strategic initiatives. On the other side of hire-to-retire processes, candidates have high expectations and want fast and fully digitized hiring processes—no more paper contracts, wet signatures or administrative-intensive hoops to jump through. Their experience as a candidate can often set the tone for what they expect from your organization and can be an advantage in a competitive hiring setting.

10 benefits of automating HR processes

Document generation and upload automation can simplify HR processes and increase productivity. Key benefits of this type of automation include:

1. Quick and easy generation of contracts and letters, including bulk generation opportunities.
2. Efficient document uploads into relevant folders.
3. Integration of key documents into relevant HR business processes.
4. Reduced time-intensive manual HR processes.
5. Centralization of HR documents in one easy-to-find location.
6. End-to-end content management over entire document lifecycle.
7. Reduced storage and labor costs associated with physical records.
8. Increased transparency and accountability.
9. Opportunities for enhancing employee self-service functions.
10. Reduced occurrences of human error.

Real-life example

Delivering faster service and boosting employee satisfaction

A European manufacturing company struggled with human error in manual steps and data entry in generating employee communications, creating a negative employee experience. Using Core for SAP SuccessFactors allows the HR department to deliver timely, more accurate and personalized communications with predefined templates and automated document generation. HR can provide faster service and boost employee satisfaction with employee self-service capabilities.

Learn more

6 AIIM, A Day in the Life on an HR Professional. (2021)

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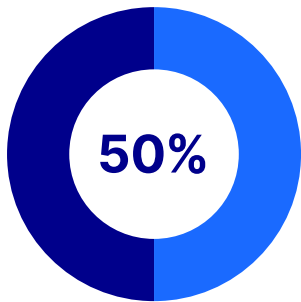
Did you know?
One-third of HR departments spend more than 50% of their workweek managing issues related to regulatory and legal compliance.[7]

3 **Address security, retention and compliance management risks**

Employee information is subject to stringent regulatory demands. HR teams must navigate increasingly complex and constantly evolving security risks and compliance requirements. In addition to building effective strategies to manage risk and compliance, HR must also build employee and candidate trust. Uncontrolled and misgoverned information can result in potential lawsuits and unhappy employees. Effective document management solutions must deliver the right combination of access and control throughout the employee document lifecycle while meeting compliance and record-keeping standards.

5 priorities for employee document management compliance include:

1. Ensuring employee documents are secure, private and compliant with legislation to protect employee information.

2. Ensuring employee files are complete and up to date and remain static throughout a legal investigation.

3. Simplifying compliance with custom rules and full audit trails.

4. Keeping documents for only the length of time they are required and archiving or purging information according to regulatory guidelines.

5. Providing peace of mind knowing that documents are secure and available to the right audience.

7 HR.com, The State of HR Compliance 2021. (October 2021)

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The most commonly cited factor making compliance difficult is technology failing to keep up with compliance changes (46%).[8] Look for an employee document management solution that allows your organization to adapt quickly to evolving regulations—adjusting processes to meet any changes to applicable rules and regulations.

An effective employee document management solution must ensure an organization's ability to comply with regulations that differ across regions and industries. When evaluating potential solutions to address security, retention and compliance risks within your HR processes, look for these key capabilities:

Top 3 capabilities that support compliance

1. **Assign retention policies:** With the ability to assign retention policies for employee documents, using HR-defined rules specific to region, country, role and document type, organizations can ensure they meet regulatory compliance for governing, archiving and purging employee information.

2. **Report on document status:** Organizations should seek solutions that offer reporting capabilities to identify documents nearing expiration or incomplete files.

3. **Identify mandatory documents:** With the ability to identify any mandatory documents as part of an employee file or onboarding process, HR teams can quickly ensure compliant employee documentation that meets applicable rules and regulations.

Real-life example

Securing HR documents and meeting retention requirements

After suffering a security breach, a multinational law firm questioned its IT department's ability to protect its critical environments. Coupled with the growing cost of maintaining legacy HR applications, the firm knew it was time to launch a global digital transformation initiative that encompassed its HR department. The firm decided to standardize on SAP SuccessFactors and chose Core for SAP SuccessFactors to meet its HR document management and retention requirements. The integrated solution offers robust security, improves records management and reduces the firm's technology costs.

Learn more

8 Ibid

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Build an integrated ecosystem for advanced HR content management

One of the most important benefits of employee document management solutions that integrate with existing HXM systems is building the foundation for an advanced HR content management ecosystem that can adapt quickly for the future of work.

What are the benefits of an integrated ecosystem?

1. **Accelerate HR processes with secure and centrally managed digital employee files:**
Organizations can have greater control of digitized content access processes with role-based permissions. In addition, organizations can greatly reduce (and even eliminate) costs associated with paper files, including paper and courier costs and floor space. Centralization of employee documents also improves the searchability and findability of employee documents while eliminating the need to duplicate documents for use in multiple tools.

2. **Support compliant digital employee files with automated tracking of required documents:**
Being able to track missing and expired employee documents throughout the entire ecosystem of HR tools supports compliance and auditability. With the ability to identify non-compliant files through a completeness check based on HR-defined rules, organizations can reduce compliance-related risks. In addition, automated retention policies mean that organizations can ensure they only keep documents for the required period.

3. **Enhance employee engagement with personalized communications:**
Advanced HR content management across an integrated ecosystem can also minimize reliance on HR by using interactive document generation and document self-service options. Some advanced HR content management solutions also provide reusable templates to ensure accuracy and consistency in messaging and communications. Another level of personalized communication within hire-to-retire processes includes streamlining processes using integrated digital signatures that simplify the workflow and support compliance.
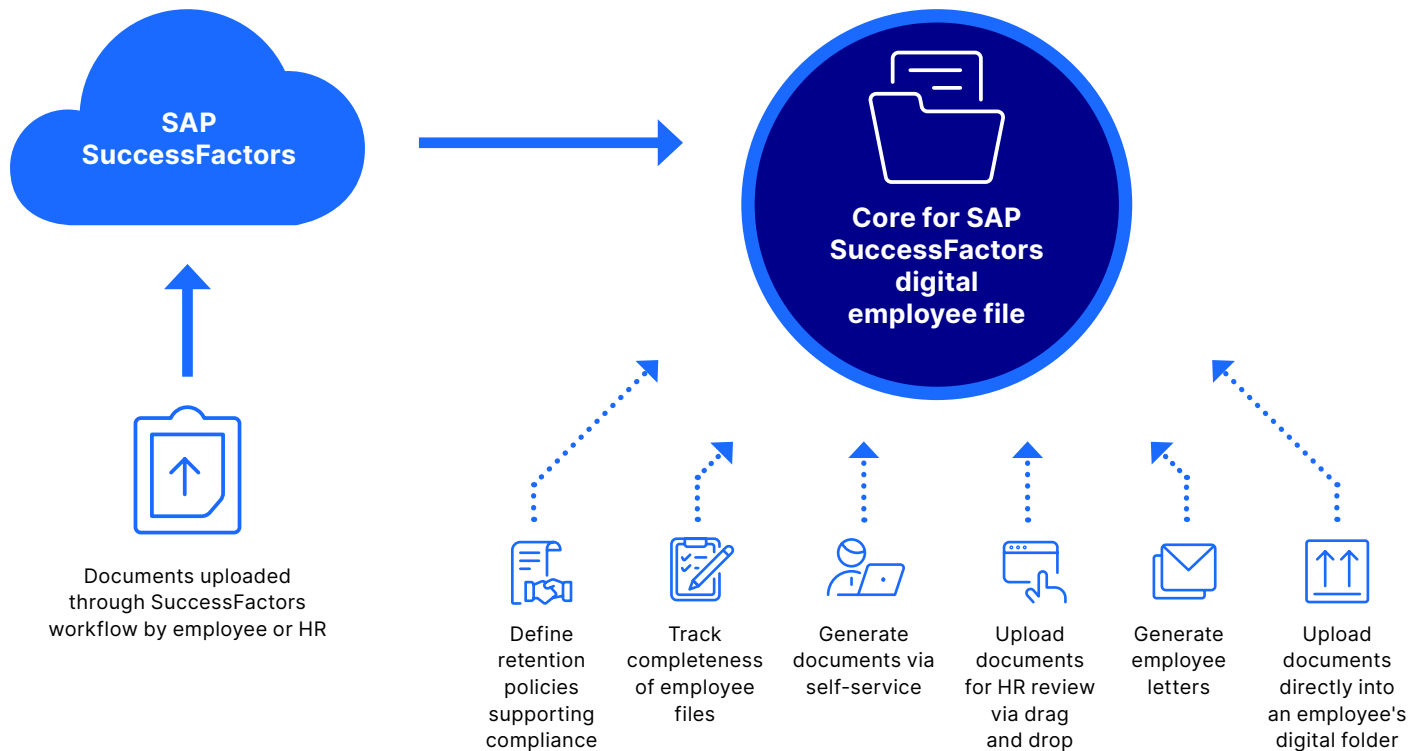
How richly integrated solutions centralize and simplify

Integrated solutions such as Core for SAP SuccessFactors combine digitized employee documents with key employee data in a central repository—accessible within the interface of your existing HXM system—making it quick and easy to view a collection of your employees' data in one place and improve HR effectiveness.

Cloud-based solutions like this improve responsiveness and self-service capabilities to enhance the employee experience. With embedded document generation capabilities, a sophisticated integrated content management solution can also produce impactful, consistent employee correspondence while retention management supports compliance requirements throughout the employee lifecycle.

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How an integrated solution connects with HR content and processes

SAP SuccessFactors

Core for SAP SuccessFactors digital employee file

Documents uploaded through SuccessFactors workflow by employee or HR

Define retention policies supporting compliance

Track completeness of employee files

Generate documents via self-service

Upload documents for HR review via drag and drop

Generate employee letters

Upload documents directly into an employee's digital folder

With the right partner and a plan to build a future-ready ecosystem, organizations can benefit from all the advantages of a cutting-edge HR content management solution, all in one place. As the challenges of modern work evolve and the race for talent continues, your HR organization will be ready to adapt quickly to address the needs of employees, attracting and retaining the talent you need to stay competitive.

Are you ready to move your HR digital transformation to the next level?

Think outside the box with SAP SuccessFactors HXM integration

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