Service management for HR teams

Deliver superior service experiences for your workforce

HR service management for the modern workplace

Today's employees expect the same seamless, consumer-like service experiences at work as they do in their personal lives. That means human resources (HR) teams are under pressure to deliver efficient, modern support systems that can keep up with evolving demands—whether they're part of a small startup or a global enterprise.

As organizations scale, so does the complexity. Picture a global HR team managing thousands of employees across regions, each with unique needs spanning hiring, pay, benefits, and learning. Factor in ongoing workforce transitions—onboarding, exits, promotions, and role changes—and the challenge becomes overwhelming.

Without service automation, HR teams often struggle to deliver efficient, consistently high-quality service experiences. Time-consuming manual tasks consume valuable resources, leaving little capacity for strategic initiatives like workforce planning and employee engagement.

Challenges of HR service delivery without automation

HR teams operating manually or with limited automation often struggle to deliver timely, consistent, and compliant services. Some of the key challenges include:

Limited self-service options

A lack of robust self-service options makes it challenging for employees to find quick answers to simple questions. This reliance on HR causes unnecessary service delays and leads to poor employee experiences.

Fragmented, decentralized support

Siloed, hard-to-navigate processes discourage employees from seeking the support they need. Different areas of HR may use different tools—such as for vacation requests, payroll questions, and educational benefits—each with its own login and interface. Faced with this fragmented experience, employees may abandon their requests altogether.

Slow manual processes

Handling support requests through siloed tools, shared inboxes, or spreadsheets makes it difficult to track requests and provide superior support. Much of HR's time is spent responding to repetitive inquiries.

Misrouted tickets

Without service automation, misrouted tickets can't be reassigned across HR functions, which is frustrating for employees and creates dead ends. Take a simple example: if an employee submits a leave benefits inquiry to payroll instead of the benefits team, the request may bounce around or sit unresolved.

Inadequate reporting and insights

When HR processes aren't supported by automation, HR doesn't have a clear view of task ownership, performance metrics, and process bottlenecks. Missing insights into key metrics like response times, resolution rates, and employee satisfaction make it hard to drive improvements.

Compliance and data privacy risks

HR must uphold strict labor laws and data privacy regulations, where mishandling sensitive data carries serious legal and reputational consequences. Outdated tools and manual processes can't meet the high standards required to safeguard personal information.

Key benefits of service automation for HR

Automating HR case handling brings structure and scalability to HR services, delivering value to employees, HR, and IT alike.

For employees:

- 24/7 self-service support via a virtual agent and a relevant knowledge base
- Improved transparency into HR policies, benefits, and procedures
- Real-time visibility into the status of requests
- Faster response times and reduced wait times
- A seamless and satisfying support experience

For HR:

- Faster resolutions through automation
- Standardized, consistent service delivery
- Lower ticket volumes through self-service ticket deflection
- Improved employee satisfaction scores
- Reduced workflows with automation and integration
- Enhanced visibility into performance metrics (such as service-level agreements (SLAs) and response times)
- Improved compliance through built-in approvals and policy enforcement
- Scalable support for growing or distributed teams
- Better collaboration with other departments via shared workflows and integration with payroll, content management, and human capital management (HCM) systems

For IT:

- Reduced silos and application clutter through a unified service management platform

- Enhanced security and compliance

- Integrated workflows across departments (for example, IT, HR, and finance for employee onboarding)

- Lower operational costs

- Greater return on investment (ROI) from existing IT service management (ITSM) tool through broader enterprise use

Apply ITSM best practices to HR support

What's the best way to get started with automated service management for HR? Apply proven ITSM best practices as a foundation for HR service automation.
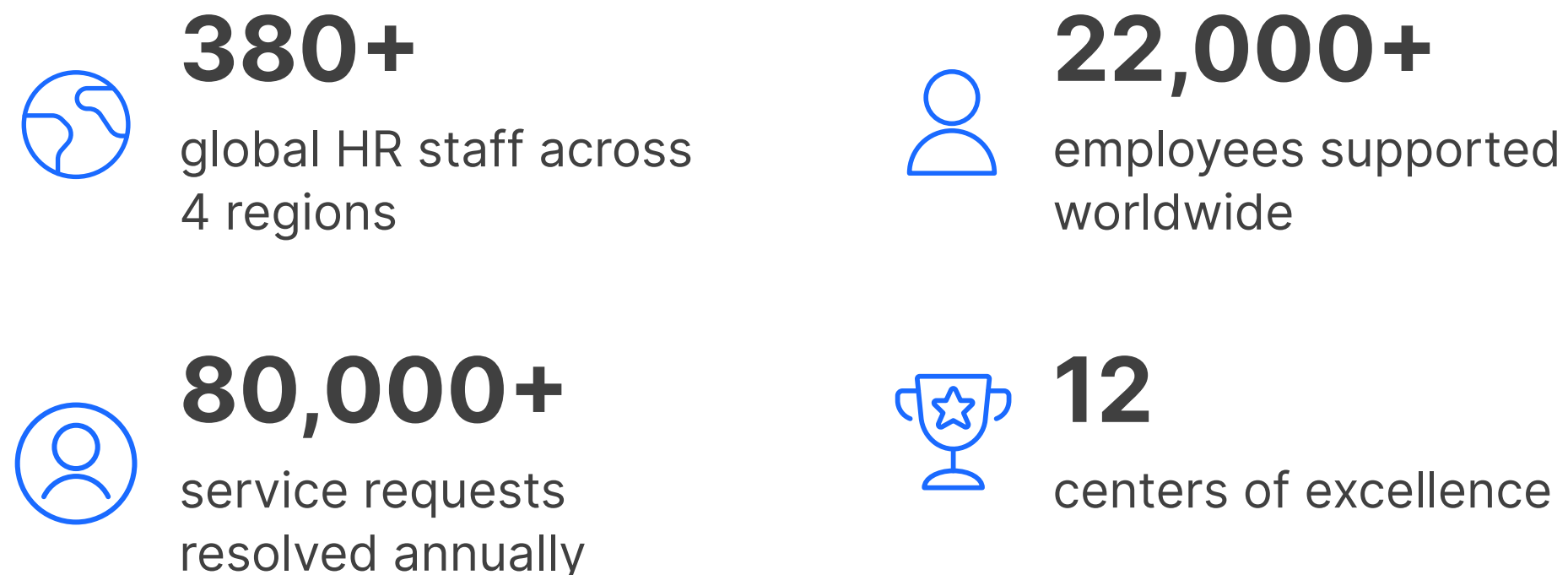
Grounded in the Information Technology Infrastructure Library (ITIL) framework, ITSM offers a structured approach with predefined standards and methodologies for managing and delivering IT services. By applying the best practices of ITSM—such as service catalogs, streamlined workflows, and self-service support—organizations can bring the same consistency, efficiency, and cost-effectiveness to HR service delivery.

Whether the service is IT-related or part of HR, the goal remains the same: to deliver efficient, reliable, and user-centric support.

From manual to modern: How OpenText transformed HR service delivery

Powered by OpenText™ Service Management, OpenText rolled out a single service desk across all corporate functions, including HR.

OpenText HR at a glance:

380+
global HR staff across 4 regions

22,000+
employees supported worldwide

80,000+
service requests resolved annually

12
centers of excellence

Challenges:

- Decentralized support with reliance on email
- No reporting and tracking visibility from shared inboxes
- Poor system performance with a legacy non-SaaS tool
- Limited ticket routing between HR and IT
- No task automation, with the service desk serving only as a notification point

Results:

By centralizing 60+ HR service offerings and automating tasks, the HR team achieved impressive results within just two months of launch:
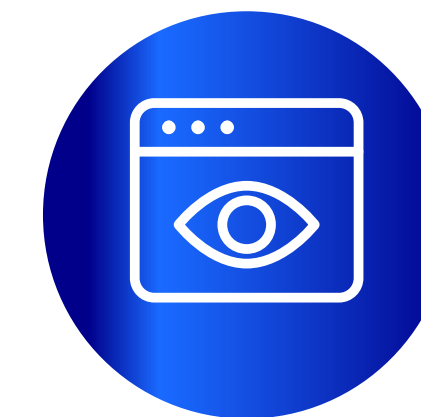
CSAT increased from
83% → 93%

Ticket volume reduced
by 10% YoY

HR page views grew
by 15%

"With over 80,000 tickets last year, our HR team was overwhelmed triaging requests across various areas of HR, such as benefits, compensation, payroll, and recruitment. By automating with OpenText Service Management, we reduced ticket volume and increased our CSAT scores within just two months of going live.

Now, employees are routed directly to the appropriate HR team without triage, and tickets can't be closed until the employee confirms the issue is resolved—addressing a previous challenge where agents could close tickets prematurely. These changes have significantly improved the overall employee experience."

Robert Brown,
HR Technology Business Analyst, OpenText

Streamlining employee fitness reimbursement at OpenText

Previously

When OpenText employees wanted to submit a fitness reimbursement claim, they had to download and complete a form, open a ticket in a legacy system, and attach the form. HR agents then manually reviewed submissions and followed up on missing or incomplete information. Eligibility tracking and claim limits were also handled manually.

Today

The fitness reimbursement process is fully automated with OpenText Service Management. Employees simply submit their request directly through the service portal, where the system automatically ensures all required information is collected before reaching an HR agent. Claim limits and eligibility are calculated and displayed in real time, eliminating guesswork and manual tracking.

"Automating our fitness reimbursement program has been a game changer. With OpenText Service Management, all the necessary information is collected upfront, and entitlements are automatically calculated based on each employee's country. It's saved our HR team—who each handle up to 700 tickets a month—a tremendous amount of time. When you scale that across 22,000 employees, the time savings are significant."

Luis Chavez,
HR Operations Analyst, Manager, OpenText

Key capabilities for HR service automation

When evaluating tools for automating HR service management, look beyond basic ticketing functionality. The right platform centralizes HR support, streamlines case handling, and provides employees with a seamless, user-friendly experience for submitting and tracking HR-related requests.

So, which capabilities matter most? Here are the essential features to consider—and how OpenText Service Management delivers on each one.

1. A self-service portal and mobile app

A unified, intuitive service portal and mobile app covering both IT and non-IT services allows employees to submit requests, find answers, and resolve issues. Integrated features like FAQs, knowledge articles, guided automation, and an AI-powered virtual agent enhance the user experience.

2. Aviator: A private generative AI virtual agent

OpenText™ Aviator™ leverages the power of generative AI to deliver conversational support in natural language, empowering employees to resolve requests on their own. It also supports HR agents by providing ticket summaries and suggested solutions to accelerate resolution. Best of all, Aviator is private—ensuring enterprise data remains secure.

3. Omnichannel support

Employees can reach HR through multiple channels, including email, phone, and communication tools like Microsoft Teams®. They can approve ticket resolutions or add comments directly via email—without needing to log into the service portal or mobile app.

OpenText Service Management:
Unified, intuitive self-service portal

4. Centralized knowledge management

Maintaining a centralized knowledge base means employees can easily access reliable answers, policies, and how-to guides within the self-service portal. Aviator can also help create and update articles by drawing from resolved cases, ensuring content stays up to date.

5. Prebuilt HR content

Out-of-the-box intake forms and process templates for common HR services—such as benefits, travel, onboarding, and payroll—make setup faster and easier. This helps HR teams ensure consistency and save time from the start.

6. Codeless configurations

Without relying on developers, a no-code/low-code design studio makes it easy to create service management applications that survive upgrades.

7. Configurable service catalog

A service catalog serves as a centralized repository of available services. Organized into categories like benefits, travel, learning, vacation, performance, and career development, the catalog uses entitlement rules to ensure employees only see services they're authorized to access.

8. Streamlined approvals

A centralized approvals queue helps HR managers track and manage pending items, including those requiring action on behalf of team members.

9. Workflow automation and integration

End-to-end service delivery becomes possible through automation and integration with third-party and OpenText tools that include collaboration, human capital management (HCM), and enterprise content management tools. Cross-functional coordination across departments such as IT, HR, facilities, and finance creates better employee experiences.

- **Integration with HCM tools**
  Employees can access their HR data from systems like SAP® SuccessFactors® and Workday® directly through the self-service portal—no separate login required. Aviator also uses this data to deliver accurate, contextual answers.

- **Integration with enterprise content management tools**
  Secure, role-based access to sensitive employee documents is enabled through connections to platforms such as OpenText™Content Management (Extended ECM), OpenText™ Core Content Management, Microsoft® SharePoint®, and Atlassian® Confluence®. HR agents can locate and share secure document links directly from the service portal, while all content remains safely stored in the enterprise repository. Aviator can also access this content to answer employee questions.

OpenText Service Management: Out-of-the-box HR content
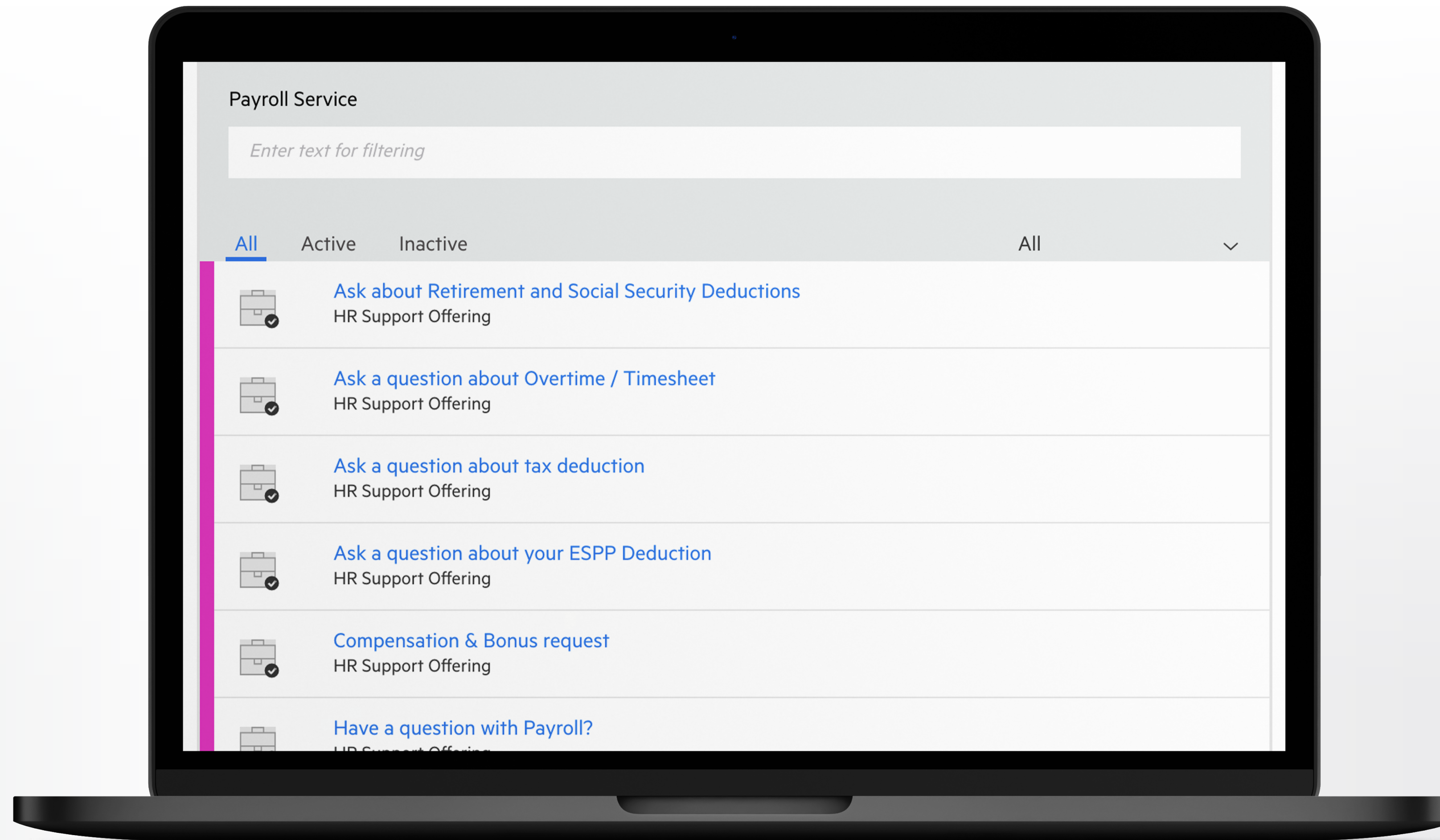
10. SLA monitoring

Real-time visibility into key metrics—such as response and resolution times—enables tracking of performance against service-level targets. SLAs can be defined for each step of the service process, including review, approval, and fulfillment.

11. Advanced privacy controls

Data domain segmentation ensures that only authorized individuals, roles, or groups can view specific tickets. For example, IT cannot view tickets assigned to HR. In addition, Aviator enhances privacy by identifying sensitive tickets—such as those with medical or financial data—and can automatically route them to a private HR group.

12. Satisfaction surveys

HR teams can create, customize, and localize satisfaction surveys in one place, then generate reports to track trends and continuously improve service quality.

13. Reporting and dashboards

Robust reports and dashboards provide actionable insights, offering visibility into service performance, compliance, and areas for improvement.

Best practices for implementation success

Ready to implement service management for HR?
Prioritize these best practices to drive successful outcomes.

For HR teams:

Define clear goals from the start

Align stakeholders around what HR service automation is meant to achieve—whether it's reducing operational costs, improving service delivery times, or ensuring regulatory compliance. Clear goals help prioritize resources and identify success metrics.

Design for employee experience

Prioritize intuitive, employee-centered design with employee-friendly language and keywords to make self-service search relevant.

Localize for compliance and context

Engage regional stakeholders early to account for local laws, labor regulations, cultural nuances, and terminology differences. This will help ensure legal compliance and boost user adoption.

Adopt a "train the trainer" model

Equip regional HR champions to onboard local teams on the service automation platform. Training should cover how to navigate the tool, manage service requests, and use reporting features.

Establish a feedback loop for continuous improvement

Gather feedback from both employees and HR agents to optimize service offerings and adapt to needs.

For IT teams:

IT will play a pivotal role in helping HR successfully implement service automation. Team members will bring critical expertise—especially if they've already deployed the platform for ITSM.

Partner deeply with HR

Go beyond technical know-how by understanding business needs. Collaborate closely with HR experts to translate HR processes into digital, human-centric service experiences.

Start with the low-hanging fruit

Together with the HR team, identify use cases that are easy to implement yet deliver strong results in ROI, adoption, and employee satisfaction. Repetitive requests that generate high ticket volumes and place a heavy burden on HR are ideal starting points.

Use HR-friendly language

Present ITSM concepts and platform capabilities using language that reflects HR terminology and workflows.

Design for high-touch support with confidentiality in mind

HR tickets often involve higher level of privacy and engagement than IT tickets. Leverage tool functionality, such as agent-to-agent discussions and privacy controls, to support multi-agent handling and ensure sensitive issues are managed with care.

Define budget responsibilities

Assign budget ownership early, accounting for additional licensing requirements and ongoing maintenance expenses.

Empower HR to own and manage their services

Equip HR teams with the tools and training they need to configure their service and support offerings. By leveraging a no-code/low-code platform, HR can easily design and maintain their own processes, especially for standard services that don't require complex automation.

A dedicated change management office plays a key role in overseeing training, enforcing standards, managing system setup, and coordinating new releases. Most importantly, it supports a mindset shift—moving away from ownership by IT towards empowering HR to shape their own service delivery.
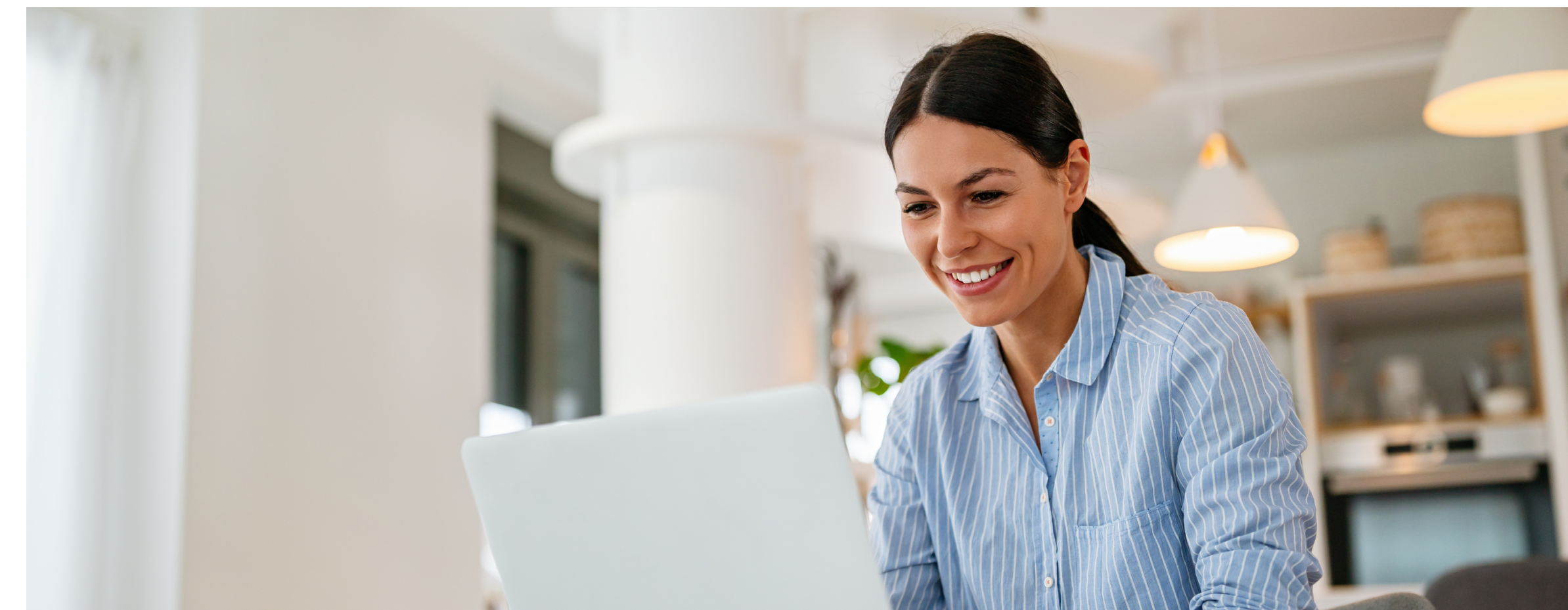
Your next step

A service is a service—whether it's for IT, HR, or any other function.

With OpenText, you gain a trusted partner in simplifying your path to HR service excellence. OpenText Service Management empowers HR teams to transform service delivery, bringing ease, speed, and structure to every case.

It's not just a tool—it's the foundation for a more agile, responsive, and people-focused HR organization.

Let's get started.

Visit product page

Take a tour

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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