MONTAGE

Otago Polytechnic produces more than 1000 letters and employment agreements each year. To work smarter, its small HR team needed an online staff onboarding system that did everything electronically, from approval to recruit to completing all employment documentation to loading into payroll the right person in the right team in the organisation. They looked around for such a solution. They were hard to find and expensive.

The solution lay closer to home - partnering with innovative Christchurch-based Montage, the business behind Montage Online, the market-leading workflow engine that allows businesses to run their business their way most efficiently and effectively. The outcome: Otago Polytechnic can complete all their employment processes online with little fuss for administrative staff and managers throughout the Polytechnic.

Scenario

Otago Polytechnic is a busy place, offering educational training and qualifications ranging from certificates to Masters' degrees. With campuses in Dunedin and Central Otago teaching about 5000 Equivalent Full-Time Students, including about 500 international students from 41 countries. It also has a campus for international students in Auckland.

Staff numbers have reached about 515 permanent staff, about 215 casual and nearly 100 on fixed-term contracts. The Polytechnic prides itself on being an industry leader. Staff turnover of 8 percent compared with the national education sector rate of 13 percent is just one example of achieving quality results in a tough industry.

Montage was introduced to Otago Polytechnic when they needed some help with their Payroll in 2013. That led to Montage Practice Lead Simon Lind demonstrating an application under development which in turn led to Montage's involvement with a couple of mini-projects. The projects consisted of the configuration of two forms that could be used publicly and internally – an Application for Employment (employee) and a Contractor application.

A good working relationship developed as a result which, along with Montage's knowledge and experience of HR processes and the existing software, was sufficient to convince Otago Polytechnic that it would be the right partner for a larger project in mind.

For Brian Cuming, Otago Polytechnics' HR Systems Developer, the experience provided confidence that Montage could manage the bigger projects as well.

"We were able to gauge their experience regarding HR process, and they were familiar with our payroll database," Brian said. "That was quite important because a key thing to ensure we could get the best out of the system was the links between our payroll, the Montage system and other systems, such as the recruitment tool we use, QJumpers, and our inhouse engine that manages network access for all staff.

Initially, the Polytechnic was looking to replace its SharePoint-based Form Builder system that only partially delivered on their vision – having an online Onboarding system that delivered the entire process of getting the right person into the right team in the organisation.

The connection between the existing payroll database and Form Builder was limited. It was a way for all internal staff in all departments to be able to request a variation of a person's employment conditions or to take on a new staff. It had limited capabilities. Interactivity needed to be greater.

The solution also had to automate the internal process of delivering employment documentation such as letters and employment agreements to existing staff members as well as new employees. The Polytechnic had done some research on the labour-intensive work involved under the existing system– it sent out more than 1000 letters and employment agreements.
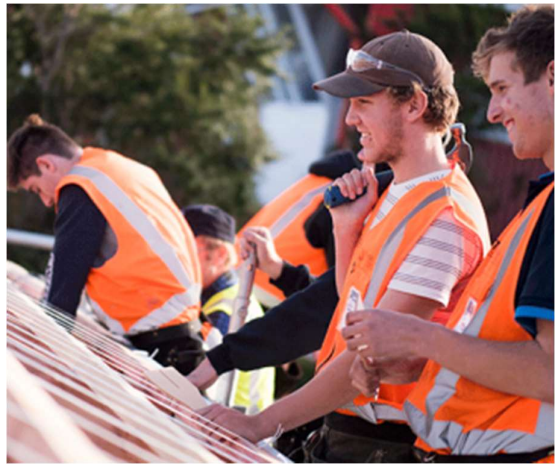
The system also had to have single sign on, using the Otago Polytechnic network credentials rather than introducing another user name and password to internal users. Finally, the solution had to include a process to automatically create new network accounts for new employees.

Nirvana would be a one-stop shop for all interactions with the Polytechnic's HR, called People and Culture, to streamline transactions, be more efficient and consistent and release Staff Advisors for more productive tasks.

Polytechnic staff did look elsewhere for such a solution. The local university had bought an elaborate off-the-shelf system which they still had to customise to their operations. It had the necessary attributes but the price range was well beyond the Polytechnic's budget. Further, the incumbent payroll and its associated self-service kiosk was limited and not able to be customised easily.

A search in the marketplace did not find the complete off-the-shelf package the Polytechnic team was looking to build in incremental stages. The Polytechnic's previous experience with Montage and delivering the successful mini-projects, as well as preliminary discussions on the bigger project, led them back to Montage's door, Brian said.

"They fitted our approach to develop agile, modular-based and well-constructed systems, even if it takes slightly longer, so that we would have a solution that would be robust, flexible with changes in the business world or legislation, and one we could easily maintain." It also meant it would be paid for gradually.

The Solution

The new system had to streamline that process, one that was capable of being used in more than 70 percent of employment circumstances. Creating templates and form design for letters seldom sent wasn't economical.

The onboarding process consists of a series of three forms that could be inter-related or individual starting points in an employment process.

> "They fitted our approach to develop agile, modular-based and well-constructed systems"

Within the Polytechnic's system, there had to be an approved Request to Advertise, a Request to Employ and then the Employment offer. If they were inter-related, some core data could be transferred from one to the other.

The Montage team set to work, configuring the process that ensured all the correct steps were taken through recruitment and hiring.

Simon Lind said: "We built a whole process however it's split into multiple sub processes. The Polytechnic environment is quite complicated. There can be multiple appointments on different levels, rates and salary grades. There could be a senior lecturer in one school and a normal lecturer in a different school, plus an administrator. They could be a 0.5, a 0.3 and a 0.2. It wasn't easy. Anything is possible.

"But that's something we can manage. We've tailored it around the complexity of the Polytechnic educational environment."

Internal approval processes were applied across all the forms based on budget. The likes of engagement and variation letters and employment agreements can be produced from the contents of the Employment Offer form, letter or agreement templates, with clauses attached to allow for ease of construction and amendment.

Then documentation can be attached to the Employee Details form and the successful applicants are informed by email they have details to complete online to complete the employment process.

This includes personal, tax, KiwiSaver and banking details which, when submitted, will be checked by Payroll and uploaded early evening into payroll and following touches added the next day by Payroll in preparation for the first payment.

The Results

Like most projects within large organisations, variables can come into play. The implementation had its challenges including organisational changes, new employment legislation, staff working from the U.K and changes at their payroll provider.

However, going live with Onboarding and Variation of Employment forms, Otago Polytechnic now has a solution that delivers:

> "They have always had a resolution to any issue we have encountered and always been forthcoming with advice based on their experience."

- A streamlined and extended online Onboarding process housed in one system and easily accessed for all staff (using single sign on).
- Sustainability - minimal or no printing and accessibility to historical data electronically which can be archived when required.
- Using current data from the payroll database that is the starting point for a request to vary an employee's conditions of employment.
- Automation of the creation of employment documentation which will hasten the process and achieve a goal of consistency.
- Capturing in a smart way only essential data without repetition will lead to greater efficiency and ease of use for seldom users.
- The starting framework that the organisation can use in future to enhance the new employee experience by using monitoring tools such as email reminders, surveys and tasks to minimise risk in that vulnerable first year of employment.

In June 2016, they went live with the Employee Details form completed by new or returning employees. Since then, there has been less data entry in setting up all such employees in the payroll database, behind the scenes automation of their Otago Polytechnic Network accounts and consistency of approach for new staff.

One of the Polytechnic's goals since 2012 has been to reduce its carbon footprint and the solution helps that by storing all documentation electronically.

Importantly, it has been able to tighten its employment processes around photo ID, entitlement to work and providing tax information.

"Montage has delivered on all the agreed components of the solution," Brian said. "They have always had a resolution to any issue we have encountered and always been forthcoming with advice based on their experience

Future

"Montage were very good," Brian said. "They came up with a few whizzy ideas. For example, not everyone is completely computer literate about attaching documents and they came up with a couple of solutions, especially for tax and Kiwisaver. They have been quick to respond when we had any issues to resolve, especially in the live area."

"It's been a good learning curve for us but, thanks to Montage, nothing has really stopped us from improving areas within the form to make it function better," he said.

"In addition, they incrementally improve their product which has spin-offs for their clients including ourselves.

Montage had shown innovation and initiative along the journey. One such innovation was having HMTL pages for static content in the actual product itself.

Said Brian: "I'd think 'I could use that.' So with a little bit of work, I could put all the online help directly into the product." Users only had to click on a help option to access all our Help components, a handy tool.

Given the enjoyable Montage experience, Brian and the team at Otago Polytechnic are already considering other areas where they can continue to reduce their carbon footprint, while delivering additional efficiencies.

Brian said they had looked into the future to build a complete recruitment system. The potential employee starts by applying for the job using our public forms. If they're successful, they're short-listed and end up on the Polytechnic's payroll database as an employee. It covers all the steps required and then spins off other processes, such as ensuring follow-up for the likes of inductions and training.

There was also a longer-term strategy in mind. An employee coming into the organisation is only the first step. "The rest is in that first year, making sure we impress them enough so they want to stay."

> "I would definitely recommend Montage for their expertise"

"I would definitely recommend Montage for their expertise, that is, knowledge of HR processes, system innovation, always looking to improve and excellent customer service."

Montage had a can-do attitude and wanted to provide the client with a solution that they can ultimately maintain, based on organisational goals or business changes.

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