ALLOCATE

erTracker

Using analytics in Employee Relations cases

A guide to help you improve case management through proactive monitoring

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Getting ahead

Improve case management through proactive monitoring

Employee Relations (ER) cases can be complex. Tracking, recording and monitoring all activity relating to an ER case from initial referral to HR through to the final steps in a policy takes time, and in some cases, creates a lot of data to track. Understandably, it doesn't always happen as well as it could.

Different stages within an employee relations case also require certain inputs and different policies have varying time frames, especially for key steps. Consequently this means it's difficult to keep on top of.

Whilst there is in fact no legal requirement for organisations to record and keep any data on employee relations cases, it is highly recommended that they do so – should an employee be dismissed and there is no record of the case then companies could be at the mercy of an employment tribunal. That's why keeping demonstrable evidence of all stages of an ER case is so important. Plus, it ensures employees are all treated fairly, equally and consistently.

However, if a company is going to collect data from ER cases, they should do it well. Ticking boxes against a policy and collecting data is really only stage one. Doing it well and doing it thoroughly results in accurate data that can change the reactive practices of most HR teams into proactive workforce management.

"We're able to easily analyse different aspects such as the number of cases we've seen, how long they have been open and identify common case types. Running reports on each individual care groups within the Trust to find out case type levels."

Jamie Disney,
Employee Relations Advisor,
East Kent Hospitals University NHS Foundation Trust

Analytics maturity

Using analytics to improve case management

Employee relations is a journey and it's one that can take time for HR departments to master. Overwhelmingly, ER cases are managed on a reactive basis with limited data collection and reports only being produced at key stages in a case. As with any job function within an organisation, working on a reactive basis creates inefficiencies in processes.

Skills and knowledge play a hand, but the key reason as to why organisations are not more developed in their management of ER cases is that the systems and tools used to manage cases are prohibiting them from progressing on their journey. Traditionally, employee relations cases have been tracked with simple spreadsheets, which allows for only the most basic of data to be collected and analysed. This is more than reasonable when there are only a handful of cases at any one time, but any more means spreadsheets become clogged, complicated and difficult to manage.

For example, to calculate how long each step of a case takes would require multiple rows of information in a spreadsheet or database, ensuring that all the key points of a case have been recorded in a standard, universal format. In reality, most organisations record start and end dates of cases, and whilst this is a good initial step, it doesn't give a rich picture of how long each element of the case took, the cost of hiring temporary staff, as well as legal fees.

What's next...

Moving beyond spreadsheets

Businesses need mature, automated recording processes in place; simply keeping track of open and closed cases can be a burden, let alone trying to keep pace with which stage a case is at. In addition, they'll need proactive alerts or reminders for when key dates and deadlines approach; this means moving beyond spreadsheets.

More than that, they need meaningful data to help them identify the common characteristics within cases, typical hold-ups or delays, an understanding of the root cause of why cases are occurring, and when to intervene to reduce further cases. This data can also level the playing field for your employees – ensuring that all employees follow the same stages, steps and procedures, and are treated equally.

Moving beyond the spreadsheet can be a straightforward process and one that can be helped by using Allocate's Employee Relations analytics maturity model – a five step process to identify how to move from reactive basic data recording to proactive case management. The maturity model sets out the common processes involved in ER cases and provides practical, actionable intelligence on how to mature your approach to employee relations.

'Allocate ER Tracker has not only helped us to visualise employee relations data, it's also allowed us to identify trends and hone in on hot spots with the aim of resolving situations early on."

The five steps to HR analytics

Step one - Manage and update cases day-to-day

Good record keeping for case management that requires recording of dates where key aspects of a case took place such as providing written warnings, any meetings that took place, etc. All HR managers should be doing this as standard.

Challenges

Very basic case information. Organisations don't have information instantly available to monitor in real-time how long cases have been open, when a task becomes overdue and the average length of the case.

Step two - Analyse cases using various dimensions

Recording case data by department, line manager, outcomes and employee demographics will start to give basic information into active ER cases. This data allows for some analysis to take place taken from spreadsheets and databases, but it's often limited by the functionalities of the software. Only quantitative data can provide analytics information. At this level, typically, most organisations are stuck on step two – not having the means to mature their approach further.

Challenges

Some analysis takes place from the spreadsheets and databases but it's often limited to summary information.

Step three - Analyse where costs occur and the amount of time spent on a case

The benefits of recording the time and cost of cases can help to understand how long various stages of the ER process takes, who is involved and how much time is spent on each case. This information then opens itself up so that continual improvement can take place – reducing time and cost on future cases. Information recorded includes the duration of cases, time spent on a case by HR and investigators, number of days the employee was suspended, legal costs, mediation costs, etc.

Challenges

To obtain case information takes many hours - manually calculating start and end dates. Costs are not easily attributable to particular cases or stages within a case.

Step four - ‘Why’ analysis / root cause

By this stage there’s a lot of factual information about ER case loads, which can be turned into insightful and meaningful data that can help to identify root causes of cases. Understanding root causes allows preventative programs to be put in place to assist in reducing needless cases in the future. These could include engagement sessions with employees, motivational or team building days. Identifying problems early on can lead to proactive remediation further reducing future cases.

Challenges

Standard spreadsheets and homegrown database functionality is extremely limiting for all but the most advanced and technically proficient users. Very few organisations take the time to review cases and even less use that information proactively to bring about interventions – time and technology constraints being the two inhibitors.

Step five - Review and benchmark open cases

With the wealth of information you now have, you can look to continually improve the efficiency of your HR case load. Processes such as reminders and automatically generated emails for activities that need to be completed should be implemented here. Even this simple step can save a significant proportion of time, as you can be confident that no stages or dates will ever be missed. This final step is what will take you from the reactive model that most organisations use to the proactive monitoring that will improve the completion time and reduce costs for all of your cases.

Challenges

Implementing an alerts and reminders system can and, will take time when doing so using standard software [if its at all possible]. Continual improvement and efficiency in your ER caseload is not an option for departments that are limited by resources.

The end game

The data you collect can give valuable insights into your employee relations cases. Taking the time to review cases proactively can highlight unseen data or information that can help you put in preventative measures that could reduce future ER cases. Recording seemingly inconsequential data can bring about interesting insights – such as why certain age brackets within your organisation are not being as engaged in their work, or whether it's a specific team or manager bringing about cases.

Using the employee relations analytics maturity model will help you move from information gathering and reactive case management to using that information to improve existing and future ER cases, which will ultimately bring about significant cost and time savings.

To find out more about any of the topics discussed in this report, please email: marketing@allocatesoftware.com

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