

Revo eGuide

The Automation Imperative

Revolutionise your employee experience by automating your joiner, mover, leaver workflow

The automation imperative

Volatility, flux, perpetual curveballs, and ceaseless disruption – the world of work has shapeshifted in recent years. First came the pandemic, the mass exodus from the office and the rise of hybrid working. Then, just as that storm seemed to be settling, economic chaos and political unrest came along to add further challenge and disruption.

With so many big questions to find answers to, what IT need to be doing less of is endless procedural and repetitive ITSM tasks. So, it comes as no surprise that during these uncertain times IT leaders are looking to raise their automation game to ease some of the burden on their teams.

In the last year, there's been an upturn in businesses requesting our help with developing automated workflows – particularly in terms of processing new joiners, movers and leavers. But what parts of the employee lifecycle can you automate? What are the benefits of performing this type of business process automation? And how can Revo make sure you have the automations in place to facilitate this?

In this eBook, we outline how we've built automations into Xurrent to streamline and enhance workflows throughout all phases in the employee lifecycle.

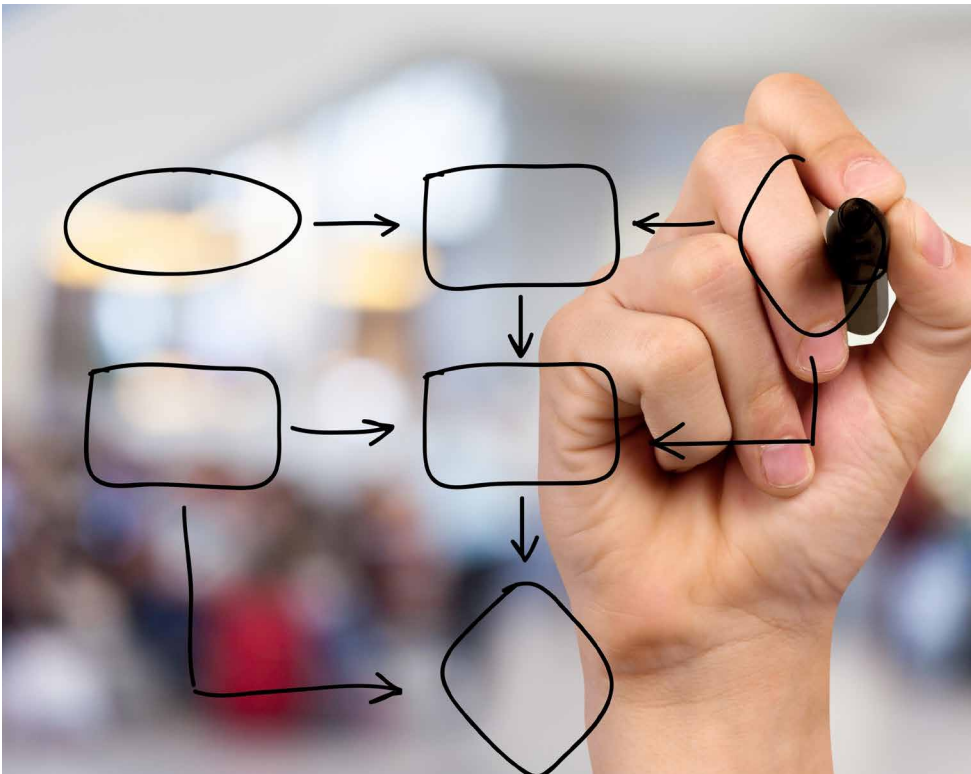
What is joiner, mover, leaver workflow automation?

Workflow automation streamlines a business process, reducing manual tasks involved in day-to-day work so they can be performed quickly and with little effort. In this eBook, we specifically talk about building automations across the core ITSM processes for joiners, movers and leavers.

JML workflow automation

Joiners, movers and leavers (JML) is the process of handling employees from when they start with you, as they change roles or departments, through to when they depart your organisation. It's essentially the lifecycle of an employee with a business and each phase comes with a long list of tasks for IT teams. These need to be performed in the right sequence within a fixed timeframe, making the JML workflow an ideal candidate for automation. Yet, did you know that more than half of organisations handle repetitive ITSM tasks – like name updates, user management, onboarding and offboarding – manually?

A survey from Information Week lists lack of automation as one of the biggest ITSM challenges, with around 41 percent of organisations admitting to struggling with the volume of manual processing. When agents spend most of their time setting up or disabling employee accounts, they're taken away from working on more complex, value-driving IT issues. Consequently, there's rising interest in automating routine tasks involved in the joiner, mover, leaver, to free up IT time.



Joiners

Streamlining onboarding-related workflows

Automated onboarding makes it quicker and easier for new employees to become integrated into your IT and service desk systems.



With up to 20% of employee turnover happening within the first 45 days, the early stages of employment are critical. An employee's experience in the first few months in their role has a massive impact on their productivity, happiness, and likelihood to stay with your company. And nothing dampens a new hire's enthusiasm more than not being able to access help with IT issues on their first day.

How efficiently joiners are added to your ITSM systems is therefore an important part of employee onboarding. Without it, they're either left in the dark or forced to spend too much time searching for answers. Or equally frustratingly, your IT team will find themselves fielding the same questions over and over again.

When we automate the onboarding process, we reduce the admin burden of adding new joiners, so you can better support new hires as they adjust to a new role and work environment. Once a candidate is marked as hired in your HR system, your onboarding workflow is triggered. This generates a Xurrent ticket that tracks all of the onboarding tasks for the new hire.

Automating the joiner workflow

✓ Automating repetitive onboarding tasks

Some onboarding activities apply to every new employee joining your company. By automating these tasks, we help you to streamline your onboarding workflows, reducing hassle and creating significant time-savings..

✓ Proactive error prevention

Manual procedures are not only slower, when performed at scale, they can lead to a higher incidence of paperwork errors. Our automations incorporate error handling provisions – preventing duplicates, invalid characters, too many characters and allowing for manual intervention if required.

✓ Breaking down data silos

Delays and difficulties with sharing and processing new joiner data can cause bottlenecks in onboarding processes. Using automation, we trigger the initiation of a new Xurrent account within seconds of receiving a new joiner request from HR. This means once a new joiner signs their new employment contract, details are sent from your HR system to Xurrent as a single request per new hire.

✓ Smarter sequencing

We can set up automated checklists and requests for line managers, allowing them to confirm what equipment and system access is needed for a new employee in a highly efficient and systematic way. We can also build in wait times for assigning licenses – for example, initiating licenses five days before the person starts. This allows for better financial management.

Movers

Supporting employees throughout their career journey

When an internal role change takes place, automations ensure the right IT processes are triggered to ensure a seamless transition.



After the dramatic increases in staff turnover post-pandemic (what was termed the 'Great Resignation') the talent market has started to settle. As open vacancies and hiring budgets both continue to reduce, businesses are turning their attention from recruitment to talent management and retention. With career stagnation an important trigger of disengagement and quiet quitting, HR is refocusing efforts on giving their best talent opportunities to grow and progress within their business.

However, every internal role change triggers a series of requirements for IT teams – from reallocating devices and swapping hardware, to changing permissions to match a job role and updating software licenses. If changes aren't administered, it can lead to an employee amassing additional access rights.

An automated 'mover' workflow is an effective way to support and simplify an employee's transition to a new department or role. In other words, it makes sure not only the right doors are opened but also other legacy doors are closed firmly behind movers as they transition into new business areas.

Automating the mover workflow

✓ Improving the employee experience

Creating a favourable employee experience is an important part of talent management and retention. We're helping our clients apply automations to ensure everything is in place for movers, so as employees progress with you, they always have the right tools and permissions to perform their role.

✓ Automating predictable mover activities

An internal role change triggers a series of predictable requirements. For example, making changes to a person's account details to reflect a change in job title or department, reallocating devices and swapping hardware, and changing permissions to match a job role and updating software licenses. Automating these tasks reduces the manual effort required to administer staff moves.

✓ Hitting the ground running

We trigger Xurrent automations to respond to changes made to employee information in your HR system. This ensures all relevant data is updated by the date required (e.g. when an employee starts their new role). Or alternatively, if it's a task that needs to be completed manually (name changes for example), Xurrent automatically routes the request to the correct team.

✓ Optimizing license usage

When employees move departments, they might no longer need some software licenses. We can set up automated checklists for line managers to ensure unneeded access to software and systems is cancelled or reallocated. This prevents unnecessary license costs.

Leavers

Delivering a seamless and secure employee exit

What if we said we can set up automations that help you to mitigate the multiple risks posed by outgoing employees, while reducing the workload of your team?



Closing IT access rights, cancelling various system logins, returning equipment – manually processing a leaver can be time-consuming and labour-intensive for IT and delays and errors can have significant costs and consequences. While all stages in the employee lifecycle are important, arguably the most risk-heavy phase is when they exit.

Whether leaving voluntarily or involuntarily, outgoing employees are seen as a risk. The potential for leavers to cause reputational damage or other security risks can't be overlooked. Failure to revoke a leaver's access can lead to misuse of software, leaking of sensitive company data and increase your vulnerability to cyberattacks and security breaches. In addition, if the leaver process isn't executed completely, licences can remain assigned to non-existent personnel, generating an unnecessary cost for your business.

We configure automations so when a termination of employment is logged on your HR system, Xurrent initiates your leaver workflow. This ensures all tasks are performed by the given leave date, without the need for manual intervention.

Automating the leaver workflow

✓ **Prompt account disablement**

With manual administration, IT will often first hear about a leaver after they have gone. An automated leaver workflow ensures IT is promptly alerted to leavers and initiates a structured approach to revoking, access and permissions and retrieving equipment.

✓ **Manual task allocation**

Not all leaver tasks can be completed without human intervention – for example retrieving hardware and devices and updating siloed systems. Where this is the case, we build in automations to ensure requests are properly routed and the correct people or teams are alerted to a leaver, so they can initiate the relevant action.

✓ **Automating repetitive leaver tasks**

Many IT offboarding tasks are standard for all leavers and critical to ensure information and system security. We implement automations in Xurrent so these actions (e.g. cancelling software licenses and access to company systems) are completed by the agreed leave date.

✓ **Dynamic workflow updating**

If a leave date shifts, Xurrent will account for these changes across the workflow, so account disabling updates and no manual intervention is needed.

6 benefits of using Revo for JML workflow automation

1.

Simplified and streamlined processes

Rather than a tangled stream of emails and repetitive updates, every task associated with a process is completed under a single automated workflow. This ensures tasks are finished on time and in the right order, with less investment of human effort required.

2.

Improved IT resource allocation

By reducing repetitive, tedious, manual tasks, you empower your IT team to focus more on higher impact work. As well as creating more business value, automation also makes IT job roles more rewarding.

3.

Mitigate security risks

A poorly managed employee lifecycle exposes your organisation to a wide array of security risks –from the increased vulnerability to cyber threats caused by unused accounts to human errors that lead to employees gaining access to company material that's not appropriate for their role. Automation significantly reduces these risks.

4.

Employee data synchronization

It's important that changes in employee details are reflected everywhere but doing this manually is an arduous task. Combining automation and integration eliminates the manual effort of keeping key employee information – such as name, job title and email address – up to date and synchronized across all your systems and applications.

5.

Smarter task scheduling and tracking

Most starter, mover, leaver processes need to be performed in a specific order. Automating your JML workflow means when a change in employee status is identified by Xurrent, a ticket is generated that initiates and tracks all tasks associated with that workflow.

6.

A better employee experience

By ensuring joiners and movers have access to the IT services, support and hardware they need, you not only empower them to perform their role, you also improve their employee experience. This has a favourable impact on job satisfaction and retention.

About Revo

We're service management experts with 100% focus on optimising the Xurrent solution for our clients. For us, delivering a solution is more than handing over a license – it's about designing work-flows that perform for you today but also evolve and continue to deliver optimal performance and value as your business evolves.



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