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# The Ultimate Guide to HR Case Management

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We cover the following topics in this article:

- What is HR Case Management?
- Dovetail's HR Service Delivery Experience
- HR Case Management
- HR Knowledge Management
- Employee Portal
- Reporting & Analytics
- Conclusion

## What is HR Case Management?

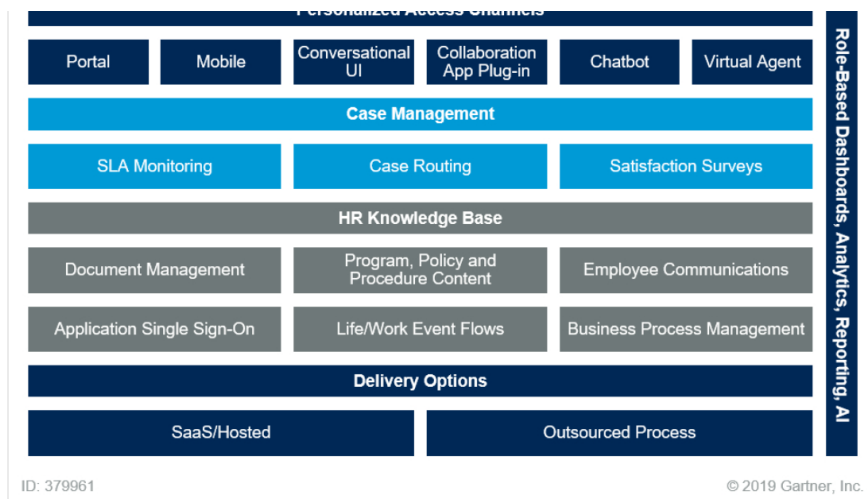
HR Case Management enables HR to improve the quality of employee services, by using advanced 'case management' features, such as Case Tracking, Workflow Automation and Reporting & Analytics to track, manage and resolve employee HR/Payroll issues, questions and requests into the HR function. HR Case Management enables communication with employees across all channels, including email, self service, phone, and Live Chat. The word "Case" is the name of the record used in the HR Case Management system to track an employees' conversation with HR. It does this by collating items such as notes, emails, phone calls, live chats, attachments, tasks and more into a single view.

HR Case Management software is also commonly referred to as an HR Ticketing system and/or HR Helpdesk, while Gartner, the global research firm, define HR Case Management in their 2019 Market Guide for Integrated HR Service Management Solutions, as an HR Service Management (HRSM) technology, and place it in their Integrated HRSM stack:

*"Integrated HRSM solutions provide holistic platforms with which organizations can manage their physical and/or virtual HR shared services operations and communications. They also deliver "content in context" to employees and managers in support of employee-related processes, policies and programs."*

### Integrated HR Service Management Technology Stack

Personalized Access Channels



Gartner detail the functionality organizations can expect to benefit from HRSM technologies:

*“Functionality typically includes employee and manager content knowledge bases, digital HR document management, business process management (BPM) tools, case ticketing and routing, SLA monitoring, and single sign-on (SSO) to transactional systems.”*

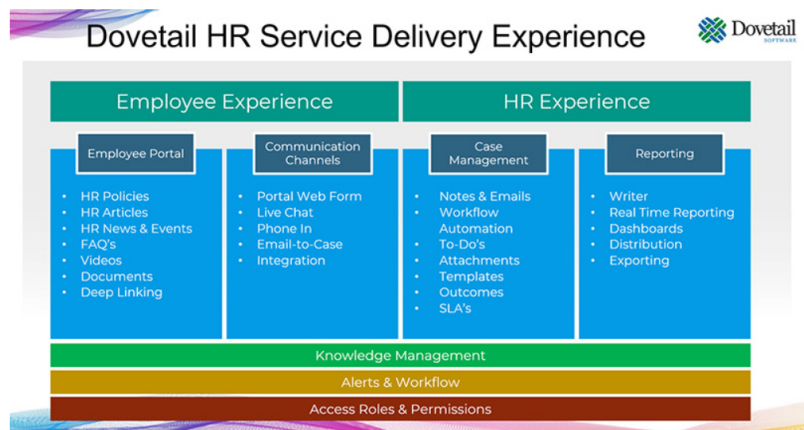
**Gartner, Market Guide for Integrated HR Service Management Solutions 2019**

Dovetail's HR Case Management software, along with other HR Service Delivery applications, such as Employee Portal, HR Knowledge Management and Reporting & Analytics, is a core component of our Integrated HR Service Delivery Experience.

READ ENOUGH? READY TO REQUEST A DEMO?

## HR Case Management and Dovetail's HR Service Delivery Experience

Dovetail's HR Service Delivery Experience (including HR Case Management) is a solution made up of a set of Service Delivery applications, that meets the needs of modern HR Service Delivery functions. These needs include, increasing employee engagement, enhancing the employee's experience of workplace technology, and improving HR's operations and user experience. They can be categorized under two overarching concepts; the Employee Experience and the HR Experience (of delivering HR services), which form the basis of Dovetail's solution.



### Enhanced Employee Experience

The concept of the Employee Experience, or EX, is garnering greater attention from companies, software providers and thought leaders in the industry. Denise Lee Yohn, author of *The Year of the Employee Experience*, defines EX as the following:

*“EX is the sum of everything an employee experiences throughout his or her connection to the organization — every employee interaction, from the first contact*

*as a potential recruit to the last interaction after the end of employment.”*

**Denise Lee Yohn, Author, Thought Leader, Advisor**

There are several reasons driving interest in EX, including complexity of the workplace and low productivity levels (See Josh Bersin's report *The Employee Experience Platform Market Has Arrived*)

The HR Service Delivery function is one area that has grown more complex. It manages hundreds, if not thousands, of interactions with employees every day, and, as a result, has a significant impact on an employee's experience (and perception) of his/her organization. By adopting HR Service Delivery applications (including HR Case Management) that improve the quality of HR services, by offering, for example, technology with consumer-like functionality, HR can improve the way employees feel about their work and workplace.

A consumer-like digital experience at work enhances the employee's experience of HR services. Accustomed to user-friendly applications (across multiple devices) in their daily lives, such as Google Search, Amazon and Facebook, employees now expect the same quality of service from workplace technology. When their expectations are not met, they can feel frustrated and dissatisfied. This need to improve the employee's satisfaction with the standard of HR services, is driving HR's demand for software with consumer-like digital features - a demand that looks set to continue with a recent study showing **29% of Gen Z US citizens self-identify as the 'digital generation'**.

Dovetail's HR Service Delivery Experience is a solution that meets this need. It provides an array of user-friendly features (accessible across multiple devices), from an Employee Portal with self-service functionality and searchable HR Knowledge Base, to Automated Workflow routing of employee requests and transparent case status monitoring. As a result, employees feel more satisfied with the quality of HR services. In addition, it means they can get on with doing their jobs more effectively and productively.

## Improved HR Experience

*“A primary goal is keeping my HR Service Center team happy, so that we can provide a great service for our employees. I just try to make their job easier, so that it's a better experience for them, and then an easier and better experience for our employees as well. That's why I spend a lot of my time looking at process and procedure in order to simplify and make efficiencies.”*

**Brittany Moore, HR Service Center Manager, CUNA Mutual Group**

A recent study showed nearly **one out of every five HR leaders (19 percent) reported their current technology as being outdated and too manual**. A lack of automation of repetitive administrative tasks is also wasting valuable HR time and detracting the HR function from bigger, more strategic challenges that their organizations are facing. With Dovetail's HR Service Delivery Experience (including HR Case Management, HR Knowledge Management and Employee Portal), organizations are updating their HR Service Delivery processes, digitizing manual tasks, automating workflows and introducing user experience (UX) design.

At Dovetail we are passionate about UX. In fact, the user experience is at the heart of what we do, shaping how we design the Employee and HR technology experience, which we define as follows:

*“The Employee and HR Experience is the sum of everything an Employee, Manager or HR user (e.g. HR Adviser, HR Manager, CHRO etc) experiences when using HR Case Management, Employee Portal and Knowledge Base technology — from the user-friendliness of interfaces, simplicity of system configuration and speed and accuracy of instant Knowledge Search capabilities, to the ease of pulling management reports and generating key business insights.”*

**Kane Frisby, Chief Strategy Officer, Dovetail Software**

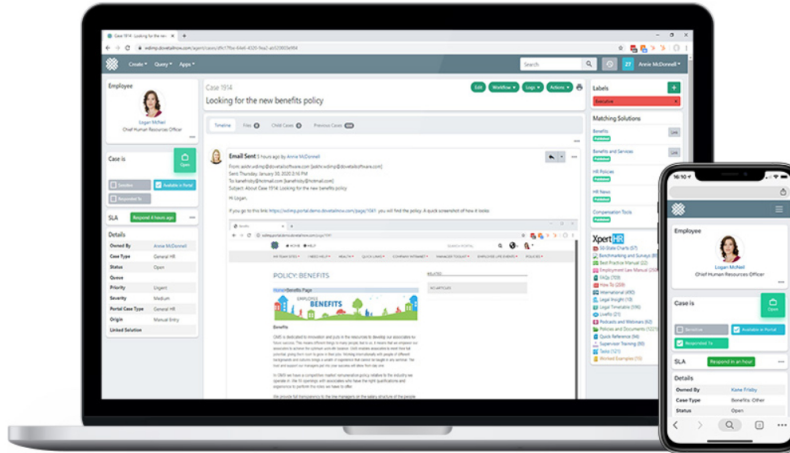
Let's discover more about the technology behind Dovetail's HR Case Management, Employee Portal, HR Knowledge Base, and Reporting & Analytics.

## HR Case Management

Covered in this section:

- [HR Case Management Overview](#)

- HR Case Management Overview
- Case Tracking
- Workflow Automation
- HR Service Level Agreements
- More features >>



The HR Case Management Service Delivery software application enables HR to deliver higher quality services to employees, while improving the performance of the HR Service Delivery team. With features such as case tracking, HR Service Level Agreement (SLA) Compliance, Automated Workflow, and instant Knowledge Search, HR can keep track of employee cases, drive efficiency from automating manual processes, successfully bring about higher quality services (by implementing an HR SLA) and find answers to employees' questions quickly and accurately. These features and **benefits** make HR Case Management a powerful tool for improving an organization's ability to meet the heightened expectations of service quality that employees have today.

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## Case Tracking

Case tracking and escalation capabilities eliminate the hassle and headache associated with using antiquated systems (such as Excel and shared email inboxes) to track employee cases, while ensuring that all employee interactions with HR are appropriately and optimally handled.

One of our customers explains how Dovetail's HR Case Management technology, including case tracking, improved the effectiveness of their HR Service Delivery:

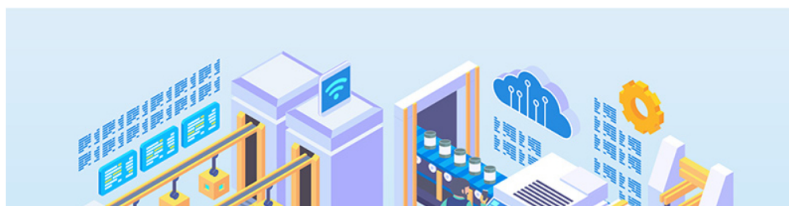
*"When USC implemented an HR Service Center there was one point where employees could call in to resolve their inquiries, it triggered a need for an HR case management system as, until then, the HR Services team had been tracking everything with spreadsheets, which was inefficient and difficult to manage, so they needed a system for tracking and they needed it really fast. Essentially, the pain point was clear, we had something we needed a system for and there was no system in place. We chose Dovetail as we felt it was the best solution to address pain points such as the tracking of cases."*

**Peter Fennema, Executive Director of HRIS, University of Southern California**

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## Workflow Automation

Workflow Automation refers to the automation of processes based on workflow rules where human tasks, data or files are routed between people or systems based on predefined business logic. It allows teams to spend more time on the actual work itself and less time on the processes that move work through the organization.

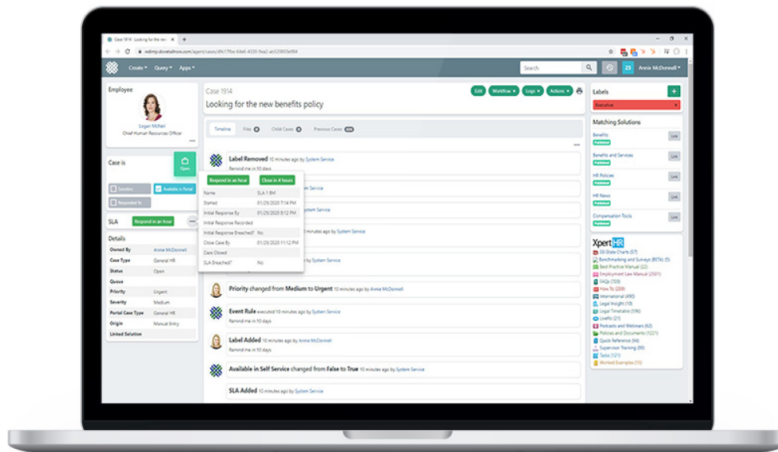




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## HR Service Level Agreements (SLAs)

Another example of how HR Case Management improves HR services for employees is by enabling Service Level Agreements (SLAs) between HR and the rest of the business.



An SLA describes the service provided and key service level targets/ metrics to be attained, as well as the specific responsibilities of HR (the service provider) and employees/ managers (the customer).

The adoption of an HR SLA, within the HR Case Management application, is proven to have a number of benefits including, improved employee service management, enhanced employee experience, more efficient HR resource allocation, and improved team performance. To find out more read our [Top 5 Benefits of Service Level Agreements \(SLA\) in HR Service Delivery](#).

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## Additional features of HR Case Management include:

- HR Console
- Case Creation
- Instant Knowledge Search
- Case Tracking & Escalation
- Emails & Notes
- Templates
- Audit Timeline
- SLA
- Workflow Automation
- HCM Data View
- GDPR & Privacy
- Multi Languages
- More Features >>

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## HR Knowledge Management

Covered in this section

- HR Knowledge Management Overview
- Knowledge Base
- Instant Knowledge Search
- Knowledge Management Content Editor
- More features >>

*"I wanted something that was very robust with a Knowledge Base, because in order for my team to become more efficient, I needed to push our colleagues (employees) to start using self service and not calling HR for every question that they had and Dovetail stood out for me."*

**Lori Sappington, HR Shared Services Manager, First Midwest Bank**

The HR Knowledge Management application speeds up the process, for both employees and HR (from within the Employee Portal or HR Case Management applications), of finding consistent, accurate answers to employees issues, questions and requests. It also reduces the need for employees to directly contact HR for answers, as the Instant Knowledge Search function enables them to self-serve and find answers for themselves. In addition, HR is able to increase its rate of First Contact Resolution by accessing answers to employee questions in the Knowledge Base while creating cases. The HR Knowledge Base is a key tool for improving the employee's experience of consuming HR services as it offers functionality similar to that experienced in their daily lives, with applications such as Google Search and Amazon.

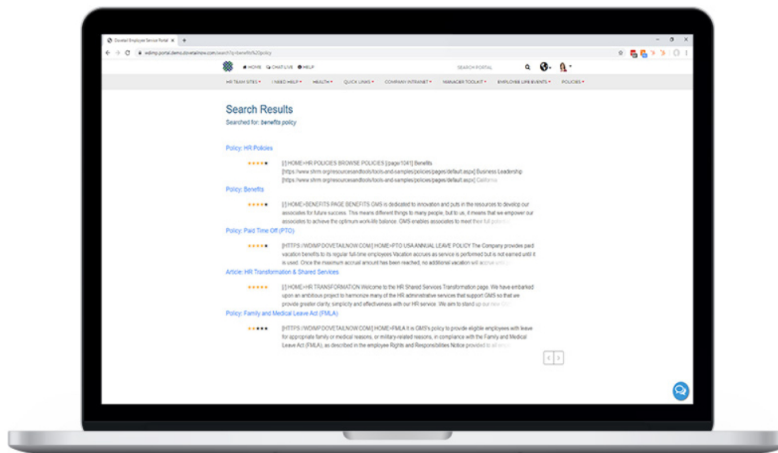
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## Knowledge Base

HR has the ability to publish answers to employee questions, in the form of Knowledge Articles, in a searchable Knowledge Base. These Knowledge Articles can include attached files, such as audio or video, to guide an employee through a specific process, or documents they can download as needed. Employees and HR Advisers can then enter search criteria (via the Employee Portal or HR Case Management applications) to find answers to their question or query. By capturing knowledge and making it searchable, HR ensure that the same problem never needs to be solved twice. The adoption of an Employee Portal with HR Knowledge Base can reduce call volumes into HR by over 50%. The beauty of a Knowledge Base is that as it grows, the more useful and effective it becomes.

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## Instant Knowledge Search

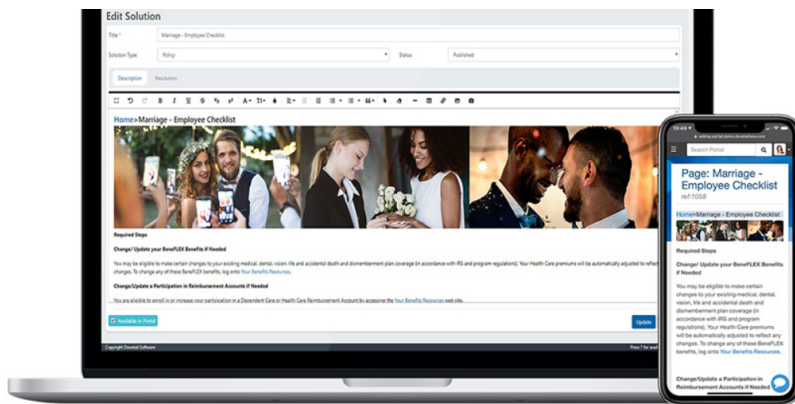


The 'instant' in the instant Knowledge Search feature is an enhancement to a traditional search function. It means that, as an employee types their query into the search field, or when creating a new case (in the Employee Portal), they are 'instantly' presented with potential answers, speeding up the process of finding the correct answer. The same is true for HR personnel when searching or creating cases from within the HR Case Management application.

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## Knowledge Management Content Editor





Within Dovetail's Knowledge Management Content Editor, HR can create, publish and share Knowledge Article content including FAQs, HR Policies, Company News and Events, Documents, Images, Videos and deep links, that are rich, powerful, and engage their employees. Access to Knowledge content is based on each individual employee's profile, which means the employee only sees content that is relevant to them, for example their vacation policy. In addition, HR can style the look and feel to engage team members and employees with the company brand and culture.

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### Additional features of HR Knowledge Management include:

- Content Editor
- Knowledge Search
- Workflow Automation
- Employee Feedback
- Audit Trail
- More Features >>

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## Employee Portal with Modern Communication Tools

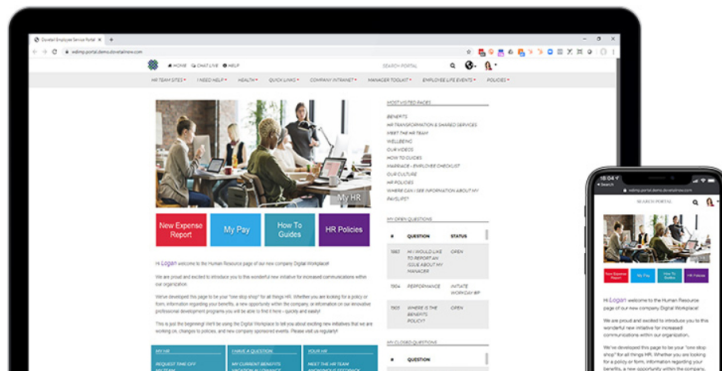
Covered in this section:

- Employee Portal Overview
- Welcome Page
- Videos and Infographics
- Live Chat
- More features >>

The Employee Portal application (which integrates with HR Case Management and HR Knowledge Management) provides HR with a communications platform that enables HR to more effectively engage employees and improve their delivery of HR services. It has a number of features including the Employee Welcome Page (with communication capabilities such as Video & Images), Live Chat and instant Knowledge Search (for a full list of features click here).

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### Employee Welcome Page





The Employee Portal Welcome Page is the primary communications hub between HR and the employees. When employees access the Welcome Page they are typically looking for answers to their questions, a way to raise complaints or grievances, or performance specific HR transactions (e.g. vacation requests, updating personal info etc). In all cases, the employee expects an enhanced personalized experience and HR to be responsive to any requests they may make, or issues they raise. It should therefore have a clean design and an intuitive 'look and feel', a prominent search function, be consistent and easy-to-navigate (with easy case-creation functionality), and 'simple to understand' menu links. Also, remember that first impressions count, and online that impression is made at lightning speed, with [one study showing it can take as little as 50 milliseconds \(that's 0.05 seconds\) for a user to form an opinion about a website page](#), therefore, user experience (UX) design is key.

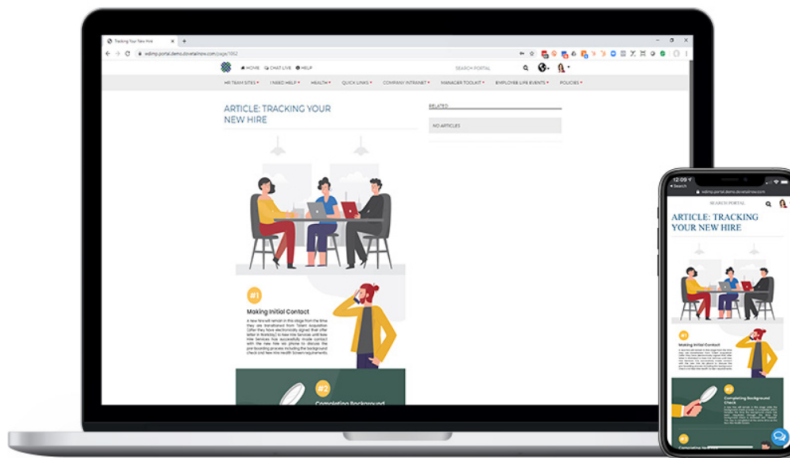
*"We preferred Dovetail's Employee portal for its design and 'easy' user experience. We wanted the Knowledge Base so that we could build our own Knowledge Articles. Some of the other providers took you out to an external website where you kind of do a Google type thing almost, whereas with Dovetail, we were able to build our own knowledge content, tailored to the needs of First Midwest Bank's employees."*

**Lori Sappington, HR Shared Services Manager, First Midwest Bank**

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## Videos & Images

Much like infographics, publishing videos and images on your Employee Portal Welcome Page will greatly enhance the employee user experience. Today, internet users love to consume videos (think YouTube) and it is now a 'must' to deliver the same rich content to your employees in order to drive engagement.



Videos on a portal might be a welcome message from the CEO, or the head of the department for that employee, health and safety guidance and new starter tips and tricks. We also recommend publishing culture videos, communication messages, and basic training videos.

The aim here is to make the portal as visual and easy to consume for the employee as possible, keeping the employee engaged whilst helping them get the answers to their questions.

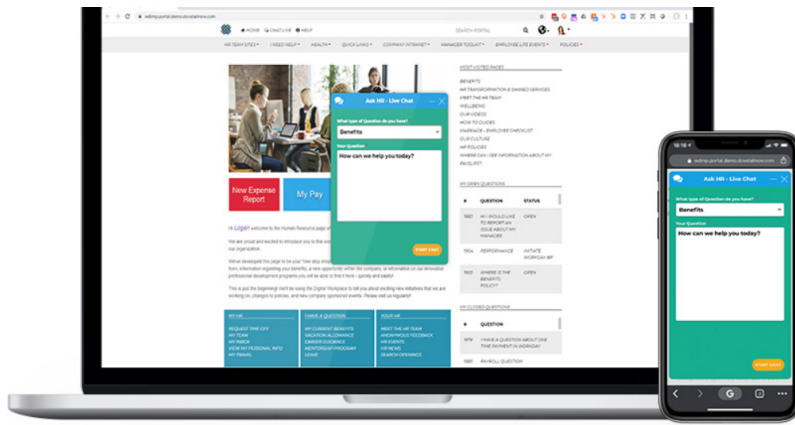
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## Live Chat

The employee of today expects consumer-like digital technology experiences throughout their day-to-day activities, which includes when they are at their place of work. So it is natural for an employee to expect to reach the HR Service team via all communication channels, be that through traditional channels such as phone and email, or through newly developed channels such as Live Chat and text messages.







Live Chat enables employees to interact with HR via the Employee Portal (in real-time) instead of having to call or send an email. It offers multi-language support, scheduling of Live HR Chats, and seamless integration to the HR Case Management system to log the chat conversations into new and existing Cases. Other features include: customization of Chat interface 'look and feel', place on hold/or transfer employee, internal HR team chats, uploading of attachments, sharing of screens and geographic locator (determining from where the employee is currently chatting with HR). Live Chat is popular with Dovetail customers that want to offer an enhanced employee communications experience:

*"We wanted something where we could Live Chat. Dovetail's Live Chat feature was great; very intuitive and we loved that the employee could create a case. We have a lot of employees and they are younger and younger every day and we wanted to meet them where they are and that wasn't something our old solution could deliver. Dovetail's Employee Portal with Live Chat ticked all these boxes, that's why we chose it and we are now seeing the benefits in improved employee engagement and greater HR operational efficiency"*

**Brittany Moore, HR Service Center Manager, CUNA Mutual Group**

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### **Additional features of Employee Portal include:**

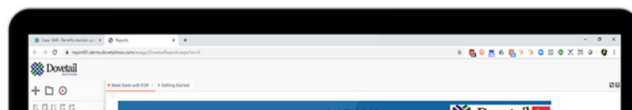
- [Welcome Page](#)
- [Most Visited Pages](#)
- [Instant Knowledge Search](#)
- [HR Articles & Guides](#)
- [Infographics](#)
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- [Live Chat](#)
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- [Portal Configuration](#)
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- [More Features >>](#)

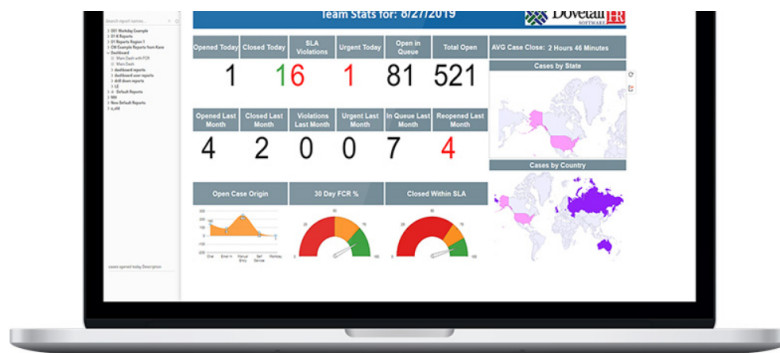
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## **Reporting & Analytics**

Covered in this section:

- [Reporting & Analytics Overview](#)
- [Pre-built Reports](#)
- [Smart Dashboards](#)
- [Report & Dashboard Designer](#)
- [More features >>](#)





HR leaders need the ability to measure, assess and manage their HR Service Delivery performance. Dovetail's advanced Reporting & Analytics, with features such as over 50 Pre-built Reports, Smart Dashboards and easy-to-use Report & Dashboard Designer, offers HR this capability, giving HR Service Managers total visibility of their work. HR is able to analyze data and metrics such as First Contact Resolution (FCR) rate, Average Handle Time, and SLA Compliance, and generate insights that enable better decision making, which drives continual improvement in team performance. With Dovetail's HR Case Management Reporting & Analytics, HR Service Delivery Managers have the tool they need to help them meet their KPIs.

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## Pre-built Reports

Dovetail's Reporting & Analytics provides customers with over 50 pre-built reports and three dashboards, including numerous report formulas that enable HR Service Delivery to manage and control their activities. Customers are able to copy, edit and rebrand these reports, tailoring to their specific needs.

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## Smart Dashboards

Smart Dashboards enable HR Managers to view HR Service Delivery information (in visual form), 'personalized' to their individual reporting needs. The feature also uses real-time filters to update the dashboard and other technical functionality to fine tune data sets.

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## Report & Dashboard Designer

Reports are easy to design, build and save in Dovetail's enterprise Report & Dashboard Designer. Functionality includes chained reports, crosstabs, express reports and dashboards.

Report data restrictions are enforced, meaning report designers do not need to spend time building in report security by audience, which makes creating and maintaining reports an easier, more straightforward process.

One of our customers recently explained the importance of Dovetail's reporting capabilities to their organization.

*"We needed HR Case Management reporting metrics available to management, to have visibility on what kind of cases we are seeing, how long is it taking to resolve cases, are we staffed properly, how many calls are we getting etc, and so we needed a system to support this process. Dovetail has given us the reporting capability we needed."*

**Peter Fennema, Executive Director of HRIS, University of Southern California**

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## Additional features of Reporting and Analytics include:

- [Included Reports & Dashboards](#)
- [Report Designer](#)
- [Smart Dashboards](#)
- [Actionable Analytics](#)
- [Security & Permissions](#)

- [Exports & Scheduling](#)
- [Express Reports](#)
- [Query Tool](#)
- [More Features >>](#)

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## Conclusion

HR Case Management is a Service Delivery software application that helps HR manage its HR Service Delivery operations, while improving the quality of service it offers employees. By integrating it with other applications, such as HR Knowledge Management, Employee Portal, and Reporting & Analytics, Dovetail have created an HR Service Delivery Experience solution that offers an enhanced employee experience and improved HR experience. Advanced technical features such as Case Tracking, Workflow Automation and HR SLA make it easy for HR to control and manage all Service Delivery tasks. Knowledge Management functionality, such as a Knowledge Base with instant Search capability and Content Editor, provides HR with the means to publish answers to employee questions, which are then easily accessible for HR and employees. The Employee Portal with Welcome Page, Videos & Images, and Live Chat communications features, offers HR an employee engagement platform that increases the employee's satisfaction with HR services. Finally, Reporting & Analytics enables HR to monitor, assess and improve its performance.

Today, HR Service Delivery managers are faced with a number of challenges that place constraints on their time, resources and budgets. At the same time, they need to demonstrate continual improvements in team performance and service quality. By integrating Service Delivery applications into an all-embracing HR Service Delivery Experience, Dovetail has enabled them to meet these challenges. It is also notable how leading global research firms and thought leaders, such as Gartner and Josh Bersin, are defining the market for HR Service Delivery applications and discovering more reasons why they are being adopted.

[CONTACT DOVETAIL NOW TO SCHEDULE YOUR HR CASE MANAGEMENT DEMO](#)

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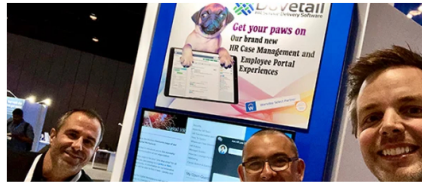
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