



WHITEPAPER

# The case for HR case management

20 ways HR case management software  
will transform your business



# Is it time to update your HR case management system?

Managing the trickier issues that inevitably arise with any workforce can be a headache. Not to mention a risk if correct employment law is not followed. Grievance, disciplinary, long term sickness cases etc. can be complicated and sensitive.

Many HR teams we speak to are valiantly trying to keep track of HR cases using spreadsheets and email, with documents stored in a variety of places. Others are using ticketing software or out-dated systems that are not fit for purpose.

**This guide is designed to help you assess the business case for making a change.**

It summarises **20 typical challenges the businesses we work with were facing prior to adopting a new case management system**, and the features that are helping them now.

“The HR team enjoy the greater degree of control Workpro gives them over their workload. The service provided to the business has improved, with easier reporting to line managers and reduced case turnaround time.”

Simon Hancock, Casework Operations Partner, DE&S MOD



## Two trends impacting employee relations

### Hybrid working

Following the Covid-19 pandemic, ‘hybrid working – with organisations offering a mixture of home and office working - has become more commonplace.

The longer-term outlook of these ‘new ways of working’ is still unknown. Whatever happens, HR systems need to be flexible enough to make any necessary process adjustments. Colleagues need tools that enable them to overcome the challenges in communication and collaboration, data security and access that remote working brings.

### Staff wellbeing and retention

Staff wellbeing and retention have come to the fore during the Covid pandemic, with mental health cases soaring. Inequality issues have also been highlighted through recent events in the news.

Tracking trends and analysing root causes of any employee issues in your organisation is vital to measuring and improving employee relations.

# Everything to do with a case in one place



HR case management software keeps all case information and activity in one centralised system.

	Challenges	Recommended feature/s	How this helps
1	Case data held in <b>multiple locations</b> (e.g., email, notes, spreadsheets, filing cabinets)	Store all case information and documents within an online case record.	Having all case information in one place ensures faster access and easier updates, improving response times.
2	<b>Duplication of effort</b> when adding case data, often requiring switching between systems.	Multiple case input methods: email, phone, letter, portal etc. Look up lists that aid data entry and categorisation Integration with other systems to share information, e.g. payroll for employee details, using scheduled imports/exports and APIs.	Overcome barriers to case submission by offering choice of channel. Reduces admin burden and time spent on case, as well as lowering the risk of manual errors in data entry.
3	Takes <b>too long to pick up a colleague's case</b> or to provide case status updates	Case summaries with up-to-date case status, with drill-down to more detail if needed.	Everyone knows exactly what has been done, when, and by whom – improving the quality and speed of responses.
4	Difficult to <b>identify related cases</b> to understand the complete picture	Ability to link case records. Flexible search facilities.	Cases can be correctly assessed in the light of all relevant information. Get to the right information quickly.
5	<b>Risk of unauthorised access</b> to case information, especially if remote working	Ability to manage case permissions and restrict user access as appropriate.	Sensitive data is protected, and access restricted to authorised users.

# Consistent Case Handling



HR case management software uses workflow to guide staff through the correct process.

	Challenges	Recommended feature/s	How this helps
6	<b>Compliance</b> with agreed process and risk that something could be forgotten or missed.	Workflow steps that guide staff through the agreed process for each case type. Configurable to match your specific policies.	Correct procedure is always followed and nothing missed. Removes over-reliance on experience and memory.
7	<b>Case handling may be inconsistent</b> , depending on who is doing the work.	Workflow validation to ensure mandatory data is recorded and key actions carried out, with notifications to alert staff to process requirements.	Policy is enforced, cases are dealt with consistently and fairly, essential data is captured for reporting and analysis.
8	<b>Response times</b> and the risk of missing an important deadline.	Ability to set manual or auto-generated tasks, with highly visual alerts and reminders	Action prompted to ensure deadlines and targets (KPIs) are met.
9	Time spent <b>creating documentation</b> & correspondence.	Email, letter and document templates auto-populated with case data. Ability to create and send correspondence within the system.	Clear, consistent communications and a faster, more professional response.
10	Difficulty collating case information and <b>sharing it securely</b> .	Bundle case documents together as required. A portal where line managers and HR team can collaborate and share case information.	Easily share case file with stakeholders, e.g. Employment Tribunal. Better support for line managers while keeping case data secure.

# Better Management Information



HR case management software provides comprehensive reporting and performance monitoring.

	Challenges	Recommended feature/s	How this helps
11	Time spent manually producing monthly reports	Library of standard reports with scheduling, for automatic creation and distribution	Produce routine reports at the click of a button, including regulatory reporting.
12	Collating data for analysis from disparate systems is difficult & time consuming	Data collection and reporting within the same system. Categorisation and filtering to access right data quickly. Create ad hoc reports and export them for further analysis as needed.	With data now consistently captured and correctly categorised, you can 'slice and dice' case information any way you want. You can more easily analyse trends, spot recurring issues, get at root causes and monitor case outcomes.
13	Keeping track of team workload, especially when dispersed geographically, e.g. remote working	Realtime dashboards with overviews of individual and team cases and tasks. Ability to assign and re-assign cases.	Managers have a clear overview of team activity and can re-assign cases easily, e.g. if a team member is off sick
14	Meeting SLAs (Service Level Agreements)	Set targets in the workflow that match KPIs (Key Performance Indicators)	Monitor KPIs to ensure you are meeting agreed levels of service and performance.
15	Spotting issues and bottlenecks for early intervention	Status indicators, with clear alerts when deadlines are approaching or cases and tasks are overdue.	Clear picture at a glance of what is going on and what needs attention.

# Improved Business Outcomes



HR case management software collects data on ER issues so you can learn from them and take action.

	Challenges	Recommended feature/s	How this helps
16	Compliance with <b>data protection</b> laws (GDPR)	Record GDPR compliance, such as date contact details last checked. File management tools that allow you to anonymise or delete case data.	Personal data is managed and retained in accordance with your policy and relevant law.
17	<b>Keeping data secure</b> and preventing data loss	Robust data backup and security management, including encryption and multi-factor authentication.	Mitigates risk from unauthorised access or data loss.
18	Reputational, litigation and/or <b>financial risk</b> from incorrect handling of case	Full chronological audit trail of all action taken for monitoring and proof - should it be needed	Employment law and business process is always followed, with any deviations justified - reducing risk of fines etc.
19	<b>Nipping issues</b> in the bud and ensuring recurring problems don't happen again	Ability to categorise and analyse root causes and case outcomes.	Spot developing trends so they can be proactively addressed. Apply learnings from case data to improvement initiatives.
20	<b>Accommodating future changes</b> in process, policy, legislation etc. in the system.	Ability to manage lookup lists, categorisations, KPIs, user permissions, field names, templates etc. yourself	System can be easily maintained and adapted over time, ensuring investment protection.

# Workpro HR Case Management Software

Workpro HR is a better way to manage your employee cases. It's easy to use, easy to integrate, cost-effective and has been developed to meet the needs of busy HR professionals like you.

Available as a Cloud-based or On Premise solution, it helps you efficiently manage and report all HR casework. Workpro HR will help your team provide a better service, while mitigating risk, increasing productivity and reducing costs.

It's time to take back control.

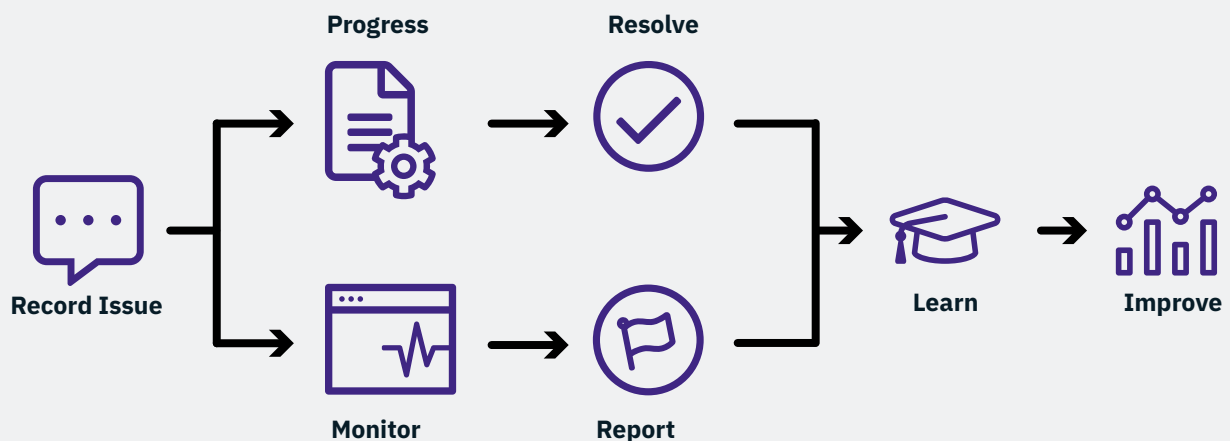
**Workpro is designed to work alongside your existing HR systems as a dedicated case management system.** We are experienced at integrating Workpro, for example with employee records in payroll systems.

“The team members are absolutely delighted with Workpro. It is intuitive and user friendly and you can easily work through the steps.”

Stephanie Dunn, HR People Services Manager, TSB Bank

## Workpro supports the entire case management process

- From recording and progressing a case to resolution.
- To flexible, robust reporting and management control.
- Leading to improvements for your whole organisation.





# Ready for a more flexible case handling process?

Find out more about Workpro HR by scanning the code or email us for a free demo at [workpro@casltd.com](mailto:workpro@casltd.com)



Workpro case management system is developed by CAS - an employee-owned technology company.

[www.workpro.com](http://www.workpro.com)

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