Working with IT

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It's obvious that communication is key to the success of any software application that IT builds for an HR department. HR's job is to be as specific as possible about an application so that IT can respond accordingly. This seems straightforward, and yet it rarely is. These two groups work hard; they meet, they produce documents to describe the application and still, the final product is not quite what either group had in mind. Time is lost; both sides are frustrated, and management doesn't understand why the project took so long or cost so much.

Why does this happen? What happens when the HR and IT teams sit down together to discuss a possible application? Does the meeting go well? As an HR professional, you probably have strong verbal communication skills and yet, when it comes to talking to the folks in IT, words just don't seem to work as well. The truth is that HR and IT speak different languages and at times, they could desperately use an interpreter.

For example, HR would like to automate the benefits enrollment process. They contact IT and describe what they want. It sounds simple to HR: benefits information and enrollment forms available online to employees using home PCs; the application linked with the benefit provider's system(s), and the ability for HR to process the benefits applications electronically. HR also wants to be able to run a number of reports themselves. They envision the application as a great advantage to the entire company saving time and money, offering better service to employees, and providing real-time analytical data for strategic decision-making.

IT listens to HR describe this application and immediately begins to think of the technical consequences of this application. Before even beginning to think about staffing to develop the application, IT begins to consider the issues of security and technical support for an application that will be available to employees 24 hours a day, 7 days a week. Linking with the benefits provider's system brings up another set of integration concerns and more security issues. As you can quickly see, IT hears the application described through an entirely different set of ears. The project comes to a halt. HR hears those deadly words "We'd love to do that, but… "

What's a better way to initiate working with IT? Have a meeting strategy. Understand the amount of time it will take to complete a project of this scope. It will take several meetings just to get the application described properly. Once the project is rolling there will be meetings where HR will view and approve a prototype of the application and finally meetings where both groups will observe user testing. It's important to understand that HR doesn't just "throw a request over the wall" and get back the perfect application. It takes communication, time and cooperation for a successful project.

Before HR Meets With IT

Carefully scrutinize the HR procedure in place and complete the work of process improvement before approaching IT. Go through the entire paperwork and action item trail to determine what could be eliminated and what could be improved. Make as many decisions as possible about changing HR processes prior to involving IT. Then when HR initially meets with IT you'll be totally prepared to describe all the functional requirements of the possible application including the audience requirements and challenges.

Define the problem in terms that everyone can understand. Without using jargon discuss what's broken in the process. For example, maybe benefits enrollment takes three months to process and the lag time costs the company money. HR knows from experience and employee feedback that the lag time exists for a variety of reasons: the time it takes employees to find the correct forms; taking the forms home to discuss with spouses, and lost forms and information booklets.

Write a description of the application. After the first two steps are taken, HR could draft a short document to describe the application. This document, written in language that any employee including the CEO would understand, will keep HR focused on the function of the application and will be the basis for the initial meeting with IT.

Meeting with IT

Even if you have worked with IT before, both groups harbor expectations and preconceptions. After all, it's a gathering of the left and right-brained people. The HR folks generally score higher in emotional intelligence, while the IT employees tend to be more linear in their approach to thinking and problem solving. Both skills are necessary to make the project successful. Respect for each other's skills is an important element to success. The key here is to stick to what you know. For HR, focus on the functional issues or the what of the application and let IT suggest technical or the how solutions of the application.

A simple example of this is HR asking IT for a Yes/No Radio Button on a rehire application screen. HR and IT will end up with the best solution if HR describes what they need, a way to give HR Managers the ability to identify whether a terminated employee should be eligible for rehire or not, than if they suggest to IT the way to implement the solution. IT will have suggestions based on their knowledge base. Keep this practice in mind during the entire development process.

Know and describe your own requirements. For example, at this initial meeting, HR could focus on how they've been working to improve the benefits enrollment process and cut costs for the company. Begin by being as specific as possible on a high level before plunging into the details. For example, the problems HR would like to solve have to do with employees filling out the forms in a timely manner and HR's ability to process and analyze the data in real-time. Then HR could present sample materials and block diagrams to describe where the current problems in the system exist for HR.

At this initial meeting note the emphasis on examples. It's a lot easier to understand something quickly with a visual aid. Also, this sets the stage for the ongoing use of visual communication between HR and IT. At this point, encourage IT to ask as many questions as possible so they can begin to understand what HR is looking for in an application. HR's goal is to provide enough information so that IT can draft an initial application proposal.

This is also a good time to discuss what kind of time it will take to develop this application. With the IT department's knowledge of its upcoming schedule and experience developing applications of this size, they will probably be able to give HR an idea of the amount of time needed. If not, ask IT to let HR know at the next meeting.

Next meeting: IT presents to HR. It's best if IT uses PowerPoint slides or another visual media to show HR the possible screens and flow for the proposed application. This allows HR and IT to discuss where an application may get stalled, but even more important, this is the beginning of HR and IT being on the same page. During this meeting it is very important to correct any misconceptions. At this meeting HR may hear that some elements of the application are not technically possible. Instead of getting stuck discussing the why, IT should re-state the problem the element is solving and as a group brainstorm a new way to solve it. This is the beginning of collaboration.

All of these initial steps may take several meetings. It is important that the application is described accurately. This is the only way that IT will be able to design what the company needs. IT does not instinctively know what HR requires and is probably not up to date on the latest best practice trends in HR. It is HR's responsibility to teach IT about HR processes.

IT shares the application prototype. This is a model of the application. Through this visual tool HR can actually see and sometimes click through the screens of an application. If HR and IT have communicated well in previous meetings, this will be a great meeting. At this juncture, HR should be making suggestions and corrections at a high level and IT will have a granular understanding of what they are about to build. Because once this prototype is approved, IT begins to develop the actual application. The approval of the prototype may take several meetings. Expect to have some changes at this point even if the application seems 'perfect.'

Now that IT has an idea of what they are to build, they can present a project plan to HR. The plan typically includes milestones, dates and interdependencies. It's straightforward and easy to understand. Both groups discuss and agree to the schedule. This part of project management is important to setting expectations for both groups.

HR and IT continue meeting on a regular basis. Depending on the size and complexity of the project a weekly meeting may be necessary. Concise, regular updates will keep both groups apprised of any issues to be solved that might interfere with the product schedule. Remember it is the responsibility of both HR and IT to successfully complete the project. This is all about teamwork, communication and respect for colleagues.

Quick Tips:

1. Avoid jargon
2. Use visuals to communicate
3. Meet regularly
4. Respect each other's skills.
5. Stick to your own knowledge base
6. Present to each other to ensure understanding of concepts and application requirements

7. Ask lots of questions
8. Know what you need before engaging IT
9. Ask IT how much time they will need to build the application
10. HR’s focus: what; IT’s focus: how

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