



How Deloitte enabled a consistent, high quality HR experience for a global bank supporting 250,000+ employees

Despite a volatile economy, companies of all kinds, including financial services, are struggling to hire and retain top talent. Demand for skilled workers, in particular, has skyrocketed while the market for top talent has become far more competitive. With the sudden shift to remote and hybrid work, recruiters are no longer restricted to a pool of candidates within a 50-mile radius of an office. Companies willing to hire remote employees now find themselves competing with one another for top talent.

It's a serious problem. In June 2022, [a joint survey from Deloitte and Fortune](#) found that 59% of CEOs expected the skills shortage to disrupt their business strategy in the next 12 months — only inflation was a bigger concern. And financial services, especially, is a highly competitive, rapidly changing industry that depends on skilled, experienced employees for success.

As such, financial services organizations need to ensure they are providing an excellent digital HR experience. They also need to continuously gather data to improve and optimize processes and support global HR decisions. And, of course, the digital HR infrastructure needs to be efficient and cost-effective. HR operations must be optimized, not only to save money, but also so that personnel can focus on activities that add business value.

**Accomplishing these goals requires nothing short of an HR digital transformation.**





## A Global Bank's HR Digital Transformation

A large financial services organization with more than a quarter million employees in over 40 countries recognized that they needed to make their HR processes far more efficient and effective. This bank, one of the largest in the world, was running its HR systems on an outdated platform that was low on the maturity scale for digitalization. Gathering and analyzing data on the aging, disparate systems was extremely difficult. Meanwhile, the on-premise systems on which the bank's HR platform ran were expensive and cumbersome to maintain.

Additionally, the bank needed a better employee experience for “moments that matter,” such as onboarding, offboarding and changing jobs within the organization. The bank also lacked true portal functionality outside of its intranet. For employees, this meant that the HR experience was not consistent. A single event such as taking a new position required employees to visit multiple sites or email multiple addresses.

And employees who wanted to find information or initiate requests with their mobile devices were out of luck — there was no mobile solution. The experience was not well orchestrated at all, which led to a lot of confusion.

The platform made automation difficult, if not impossible, to integrate with human capital management (HCM) and other critical systems. Agents had to swivel seats across systems, which meant there was a lot of manual data entry. This way of working was extremely inefficient and introduced the potential for human error. Take, for example, an employee that got married and wanted to change their name. That information would be taken in via a legacy form management system, but to get it into the core HR system, an agent would need to enter it in manually. While some integrations existed, the transfer of data between the two systems was anything but seamless.

## A Cloud-Based HR Solution with ServiceNow

As the bank searched for a solution, it knew that it wanted a cloud-based, unified global HR system that could provide a modern, cohesive HR experience and a portal for self-service activities. Ultimately, the bank chose Deloitte as its HR process and technology implementation partner, due to their confidence in the firm's breadth of HR experience and depth of knowledge across people, process, and technology, as well as its expertise in ServiceNow and cloud HCM.

In partnership with Deloitte, the bank decided on ServiceNow's cloud-based platform to provide a knowledge base, case management, chat capabilities, and a self-service portal. There were two phases to the project.

In the first phase, Deloitte deployed a ServiceNow portal, creating an HR catalog to drive self-service. The portal simplified case management, intelligent workflows, enterprise mobility, and enhanced reporting and data analytics. Employees no longer have to visit multiple sites to access the information they need. With ServiceNow, the bank's HR portal acts as a digital front door into everything HR – a single engagement layer that enables employees to get the service they want without having to make a call or raise a ticket.

If an employee wishes to take a leave of absence, for instance, a simple search on the portal renders all necessary information including the ability to initiate a leave of absence request process – even if that process is managed by a third-party vendor. The employee doesn't need to go through the hassle of noting the name of the leave-of-absence vendor, visiting another website, and making a phone call. Rather, service initiation takes place seamlessly within a single experience.

In the second phase, Deloitte provided a foundational data integration with its cloud HCM system, enabling case creation integration between the cloud HCM and ServiceNow. What this means for HR agents is that their work lives on a single tool, so they don't have to flip back and forth between systems. If there's a task that requires the agent to go into the HCM, for instance, ServiceNow provides a hyperlink. This capability enables managers to orchestrate and distribute work more easily because they can see the full volume of tasks for agents, no matter where the work originates.

**Finally, the project laid the foundation for the bank to enable virtual agent services in the future.**



## Questions?

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## Creating a Consumer-Grade HR Experience

As a result of the ServiceNow implementation, the bank was able to provide a consumer-grade HR experience to its quarter-million employees around the globe. For employees, HR is now a consistent omnichannel experience across mobile, web, phone, email, and virtual agents.

Deloitte also helped the bank develop a content strategy that would make materials easy to consume. They counseled HR on an overall taxonomy and what content would resonate well with different audiences.

Additionally, employees can finally access portal content via a fully mobile-enabled experience. The portal contains more than 300 knowledge articles – that saw 420,000 views just one month after go-live – for employees, managers, and HR shared services agents.

Ten dashboards and three scorecards make it much easier for HR to gather data across the organization, providing a deep understanding of how well they are serving employees and meeting their needs. What’s more, now that they have a holistic view of the entire workload, they can track high priority cases and work to meet SLAs in a way that was previously impossible.

The self-service project was a huge success, resulting in a 15% reduction in comparable case creation in January 2021 compared to a year earlier. The portal saw 5.2 million hits from 197,000 users in just one year.

Financial institutions’ success depends on the strength of their people, and to build and retain a highly skilled workforce, HR needs a modern digital infrastructure. This US bank shows how HR digital transformation can make HR operations more efficient and effective, while simultaneously providing a high-quality, consumer-grade experience for employees.

