Search Workshop Report

Held on Thursday 7th September 2023
Demo Location

Attendees:
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Demo Company - Fred Blogs

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About this report...

Incendo Search Workshops are high-level and are a way of starting a conversation within your business on how you could improve what you do. Most of what has been captured has been crowd-sourced from the people who attended the workshop. It is full of opinions, assumptions and dreams... It is simply a starter for ten which you can now use to make decisions on the next steps in brightening up your business!

We focussed on the following business capabilities:
On-boarding a user and in particular:

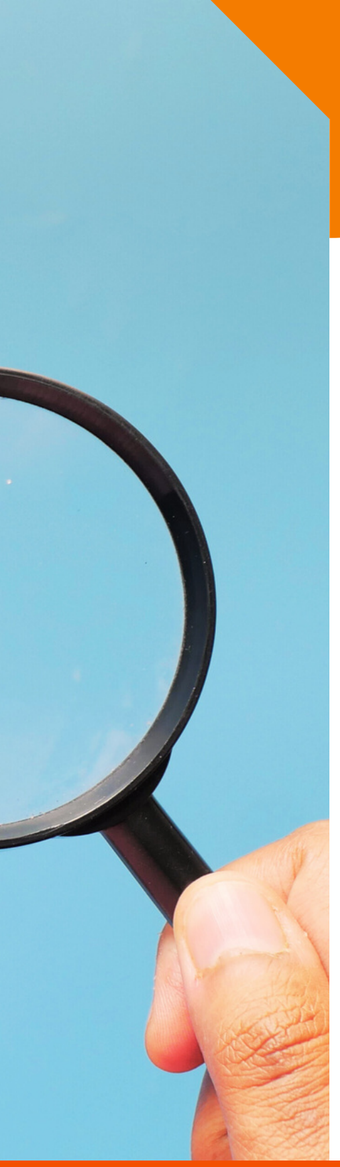
What are the steps involved in each?

How long do you spend running them?

How could they be brightened up?

ON-BOARDING A USER

Overview



On-boarding a user

Components

Set-up new starters with access to data and systems.

01 Request — Managers (~25) — E-mail — Word Template

02 Internal Review — Individuals (~2) — Word Template

03 Request Core System Access — Individuals (~2) — Online Portal

04 Set-up core system access — Outsouced Team — Various

05 Set-up specific system access — System Owners (~5) — Various

06 Issue Credentials — Admins + System Owners (~10) — E-mail

07 Orientation — Individual (1 person) — In Person

08 Archive Request Form — Individual (1 person) — Sharepoint

~50
requests per year

~1 hour
est. time spent per request

20 hours
est. elapsed time per request

On-boarding a user

Health Dashboard

Set-up new starters with access to data and systems.

Process

A preferred order and way in which things are done

Steps performed consistently

Steps formally documented and agreed

Comments:
Most steps seem to be performed consistently however they are mostly in peoples heads and are handed down through generations. This increases the risk of inconsistencies and slows down on-boarding.

Technology

Tools to help deliver the preferred method in a reproducible way

Technology supports every step in the process

Technology enforces consistent delivery of the process

Comments:
Generic technology is used throughout most steps (e.g e-mail, Word) which does not enforce standard ways of working. This could result in inconsistencies.

People

Filling the gaps where technology is not automated and/or oversee the delivery

No reliance on key people for the process to run end to end

People are comfortable taking responsibility for a step they are not familiar with

Comments:
Some steps are performed exclusively by one person. The lack of formal documented steps and generic technology is likely to result in low confidence to cover each others role

Requests

per year

~50

11% OF USER BASE

No concerns

Est. time spent per request

in hours

~1

50 TOTAL HOURS EACH YEAR

Seems high

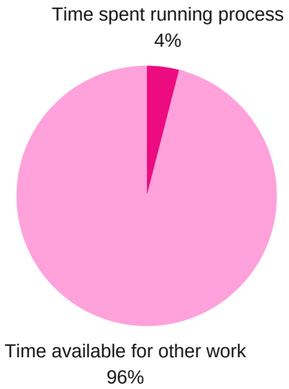
Est. elapsed time per request

in hours

~20

1000 HOURS EACH YEAR

No concerns



PERCENTAGE OF AN FTE SPENT RUNNING THIS PROCESS EACH YEAR*

*based on a FTE yearly average of 1369 hours taken from https://t.ly/OJIme

On-boarding a user

Popular Group Improvement Ideas...

Set-up new starters with access to data and systems.

6%

Capture Process

Document the process to remove reliance on key people and increase consistency

26%

Integration

Auto start the on-boarding process when a new user is added to HR system

6%

Reduce Options

Dynamically change what access & software could be requested based on location, job roles etc.

26%

Auto Approval

Build Admin & Manager approval logic into a tool/system to allow auto approval/decline

5%

Auto Archive

Have the system automatically archive the data

10%

Link Tasks

Ensure that all specific system access requests are linked and traceable

21%

Training

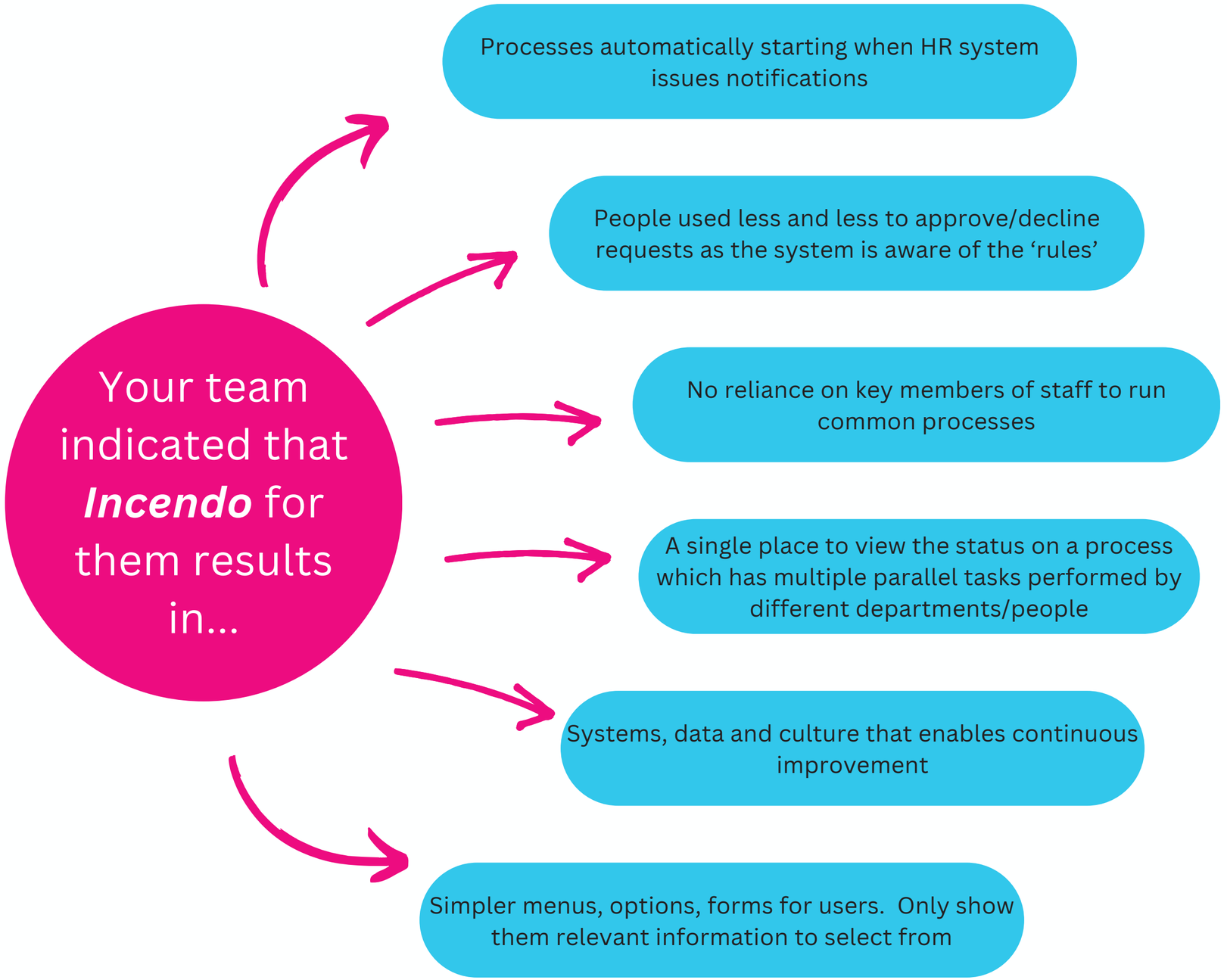
Upskill Managers on the process and the level of detail/quality required

IMPROVEMENT OPPORTUNITIES

SUMMARY

Incendo

"...to lighten, brighten, enhance..."



NEXT STEPS

+ POTENTIAL BENEFITS

On-boarding a user

Recommended Next Steps

Set-up new starters with access to data and systems.

Current State

Process | Tech | People

On-boarding a user

~50 requests per year

~1 hr spent per request

~20 hrs elapsed time per request

Future Aim

Process | Tech | People

On-boarding a user

~50 requests per year

~0.5 hr spent per request

~15 hrs elapsed time per request

Recommendations:

- Formalise and document the process
- Digitise the request form and remove internal review step through mandatory fields, automated checks etc.
- Add specific system parallel tasks into process with auto notifications to admins
- Automate a single consolidated notification to users Manager of all credentials
- Digitise the entire process workflow whilst leaving remaining systems in-place (checklist etc.)
- Automate archive step in tool
- Train/Encourage Admins to use process and digital workflow to share the delivery of the process
- Monitor the impact and work on reducing the time spent per request

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Brighter business, better results.

GOT QUESTIONS?

Please reach out.

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