

Mobile HCM

Workforce and Talent Management on the Move

June 2010

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Executive Summary

Mobile technology is one of the new frontiers for talent and workforce management. Organizations are starting to advertise jobs and manage candidate relationships by smart phone, scheduling shifts via text message, delivering multi-media learning on mobile devices, and updating performance reviews from online portals accessed through handheld devices. With all of these new options, organizations need to understand how to utilize these technologies in the most effective way to increase efficiency and address the needs of an increasingly dispersed and diverse workforce population. This research study of 230 organizations looked at the prominence and impact of mobile technology on key aspects of human capital management performance.

Research Benchmark

Aberdeen's Research Benchmarks provide an in-depth and comprehensive look into process, procedure, methodologies, and technologies with best practice identification and actionable recommendations

Best-in-Class Performance

Aberdeen used the following three key performance criteria to distinguish Best-in-Class companies:

- 82% of employees rated themselves as “highly engaged” as compared to only 23% among Laggard organizations
- 64% of employees rated “exceeds expectations” in performance reviews, as compared to only 20% among Laggard organizations
- 17% annual improvement in hiring manager satisfaction, as compared to a 3% decrease among Laggard organizations

Competitive Maturity Assessment

Survey results show that the firms enjoying Best-in-Class performance shared several common characteristics, including:

- Utilizing mobile devices to enhance communications and workflows throughout people processes
- Involving IT in order to ensure that the mobile tools used were in compliance with the overall IT strategy
- Ensuring the security of mobile device transactions

Required Actions

In addition to the specific recommendations in Chapter Three of this report, to achieve Best-in-Class performance, companies must:

- Start with the needs of the business. By focusing on a true pain-point for the business, getting buy-in from leaders and IT for mobile technology will be made easier
- Involve IT when defining requirements and selecting vendors for mobile HCM solutions and ensure that security concerns are addressed before implementing

“Because we can get information out to anyone when we need to, we’re able to support our employee’s needs to work from home or work flexible schedules. As a result, we feel we’re able to attract great talent.”

~ Vice President of Human Resource, Mid-sized, Non-profit US Financial Institution

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Chapter One: Benchmarking the Best-in-Class

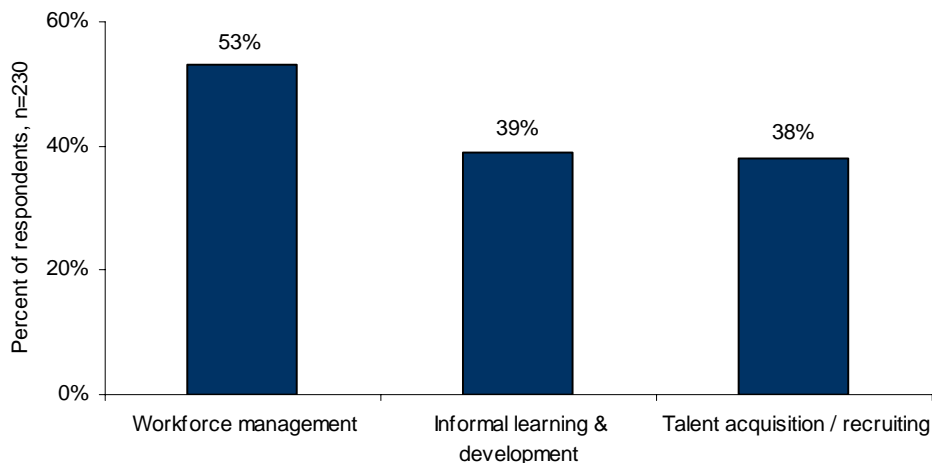
Business Context

Commercially available mobile technology has evolved rapidly since the giant "brick" mobile phones of the 1970's and 1980's. Today it seems everyone from elementary school kids to executives have access to a mobile device, and most likely that device can be used for more than just phone calls. As the cost of both devices and mobile voice and data services has continued to come down over recent decades, their use has become nearly ubiquitous. Many among us might feel that we had lost a limb if our phones were taken away from us, and most of us have personally found value in mobile devices to help us avoid missing that important call, finding out where our loved ones are, or even finding that store or restaurant we had wanted to visit. But finding their place in business practices, including workforce and talent management has taken more time. And while mobile devices are seeing wide acceptance in the business world as providing value as productivity tools, less has been demonstrated in terms of their value to executing business processes such as those within human capital. This area of emerging research is the focus of this benchmark study, aimed primarily at how organizations are using mobility tools within the world of Human Capital Management (HCM) to drive business value.

Mobile Tools in HCM Gain Traction

While voice calls, emails and text messages delivered to and sent from mobile devices can influence almost any aspect of a business, when asked what were the primary areas in HCM impacted by mobile devices, three activities rose to the top; workforce management (including scheduling and time and attendance), informal learning, and talent acquisition (Figure 1).

Figure 1: Primary Areas where Mobile Devices are Used



Source: Aberdeen Group, June 2010

Fast Facts

- ✓ Best-in-Class companies are **26% more likely than all other organizations** to currently use mobile tools to facilitate HCM processes and workflows

Definition

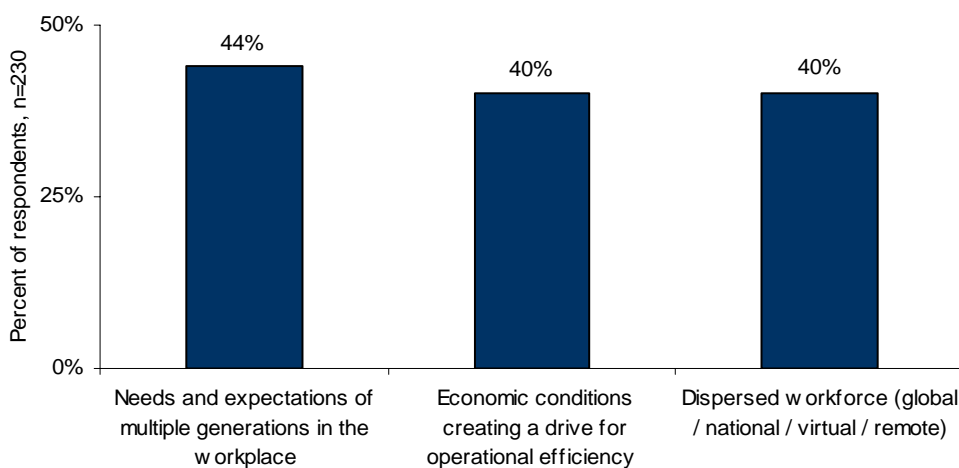
- ✓ For this study, mobile devices were defined as Smartphones (cell phones with advanced computing capabilities), Web and SMS enabled phones, netbooks, tablets, handheld email devices, and ruggedized laptops for field use (traditional laptops were excluded from this definition)

It makes sense that these three areas have emerged as prime candidates to be impacted by the use of mobile devices. Frequently, industries that rely heavily on a highly scheduled workforce such as retail or healthcare are made up of a large number of hourly workers, many of whom may not work full time. The ability to disseminate schedule or time and attendance information to these workers without them having to come in person to pick up a copy of the schedule can be very beneficial, as we will explore in further detail later in this report. In addition, talent acquisition, like scheduling, is often a workflow-heavy process requiring approvals and checkpoints along the way. The use of mobile devices to facilitate those workflows and to allow the appropriate parties to respond in a timely manner to things like requisition approvals are also a beneficial task to put on a mobile device. And learning has for millennia been driven by people asking questions and seeking answers. The use of mobile devices to gain information either from other individuals, or by accessing databases of information is something being done outside of work as people "Google that for you," as well as inside as individuals query learning content. In further sections of this report we will explore in detail exactly what types of activities within each of these three domains - workforce management, learning and talent acquisition - are driving the most value for organizations.

New Tools to Face New Challenges

There are multiple reasons behind why organizations are looking to move parts of their human capital processes to technologies such as mobile devices. But one in particular came out as the top pressure guiding the adoption of mobile tools in HCM - the changing needs and expectations of employees (Figure 2).

Figure 2: Pressures Driving the Adoption of Mobile Tools in HCM



Source: Aberdeen Group, June 2010

Fast Facts

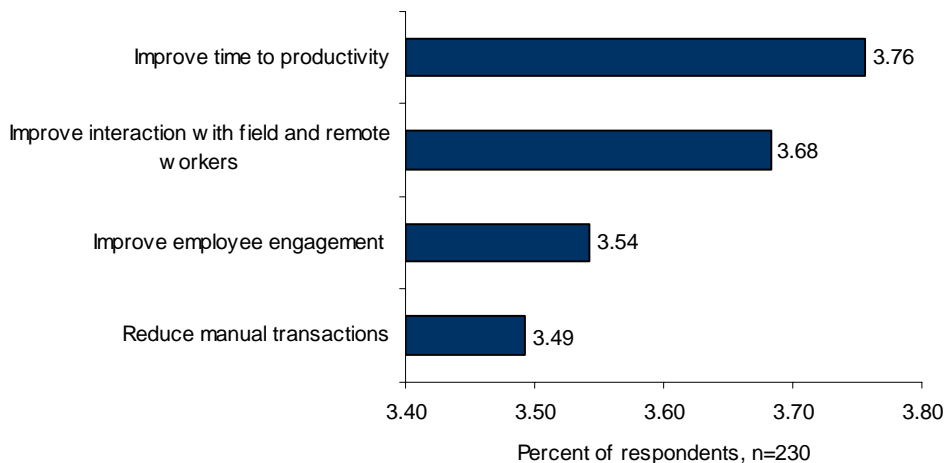
- ✓ **65%** of employees at companies using mobility tools for HCM rated themselves as "highly engaged" - versus 57% at organizations without mobile HCM
- ✓ **45%** of employees at companies using mobility tools for HCM received ratings of "exceeds expectations" on their last performance review - versus 37% at organizations without mobile HCM

This focus on the employee is a slight shift from the findings in Aberdeen's June 2009 study [The HR Executive's Guide to Web 2.0](#). That study found that

the primary pressure pushing organizations to focus on collaboration tools and social networking was the dispersed nature of the workforce, with the differing needs and expectations of workers coming in third. Clearly, the use of new and emerging technologies to connect people across the business is important, but the use of mobile technology in particular seems to be focused on ensuring that new workers have new ways of interacting with the company. And, as a result, those interactions will hopefully be able to create more value in a more efficient way.

While external pressures such as demographics are guiding companies to pursue mobile HCM strategies, internal goals are carving a path as well. When asked to rate the importance of several goals for mobility efforts, respondents echoed the external pressures, focusing on efficiency and productivity, as well as employee experience (Figure 3).

Figure 3: Most Important Goals for Mobile HCM Strategy



Responses ranked on a scale of 1-5, where 1= not important and 5= most important
Source: Aberdeen Group, June 2010

This win-win goal for mobility tools - to drive efficiency as well as employee, manager and candidate experience - is one of the key value propositions investigated in this study.

The Maturity Class Framework

Aberdeen used three key performance criteria to distinguish the Best-in-Class from Industry Average and Laggard organizations. This maturity class is defined by criteria designed to reflect the three aspects organizations indicated they are most likely to look to mobile tools to impact - workforce management, learning and talent acquisition. Once top performers were defined by these three criteria, their use of mobility tools was explored to understand the role they play in HCM processes and the impact they have on performance results. The three criteria used were:

- **Employee engagement**, defined as the percentage of employees indicating that they are "highly engaged" as of the last engagement survey.
- **Employee performance**, defined as the percentage of employees who received ratings of "exceeds expectations" on their most recent performance review.
- **Hiring manager satisfaction**, defined as the percent year over year change in hiring manager satisfaction with new hires. This metric is a key component of quality of hire.

Table 1: Top Performers Earn Best-in-Class Status

Definition of Maturity Class	Mean Class Performance
<p>Best-in-Class: Top 20% of aggregate performance scorers</p>	<ul style="list-style-type: none"> ▪ 82% of employees rating themselves as "highly engaged" ▪ 64% of employees rated "exceeds expectations" in performance reviews ▪ 17% annual improvement in hiring manager satisfaction
<p>Industry Average: Middle 50% of aggregate performance scorers</p>	<ul style="list-style-type: none"> ▪ 57% of employees rating themselves as "highly engaged" ▪ 39% of employees rated "exceeds expectations" in performance reviews ▪ 3% annual improvement in hiring manager satisfaction
<p>Laggard: Bottom 30% of aggregate performance scorers</p>	<ul style="list-style-type: none"> ▪ 23% of employees rating themselves as "highly engaged" ▪ 20% of employees rated "exceeds expectations" in performance reviews ▪ -3% annual improvement in hiring manager satisfaction

Source: Aberdeen Group, June 2010

The Best-in-Class PACE Model

In order to achieve these top results, organizations brought together a mix of strategies, capabilities and enablers to utilize mobile technology across HCM practices to support performance levels. These include:

- Utilizing mobile devices to enhance communications and workflows throughout people processes
- Involving IT in order to ensure that the mobile tools used were in compliance with the overall IT strategy and support
- Ensuring security of mobile device transactions

Table 2: The Best-in-Class PACE Framework

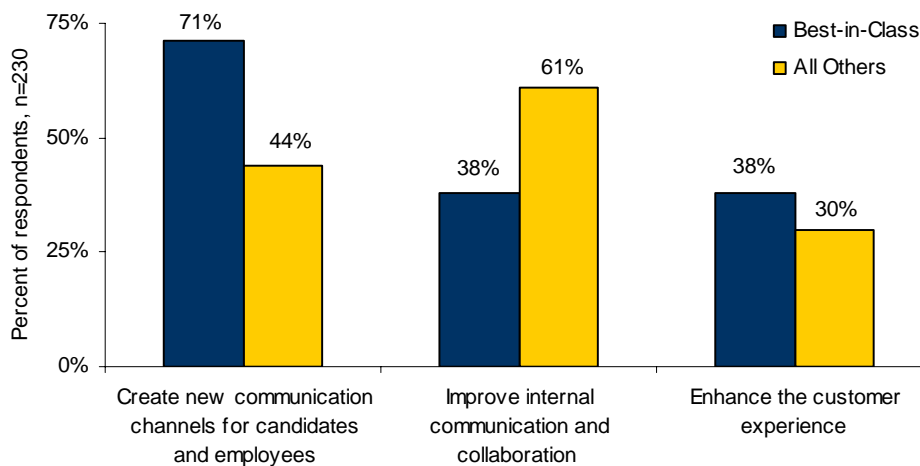
Pressures	Actions	Capabilities	Enablers
<ul style="list-style-type: none"> ▪ Differing needs and expectations among multiple generations of the workforce 	<ul style="list-style-type: none"> ▪ Create new communication channels for candidates and employees ▪ Improve internal communication and collaboration ▪ Enhance the customer experience 	<ul style="list-style-type: none"> ▪ Involve IT in the vetting and selection of mobile HCM solutions ▪ IT and HR collaborate around requirements to support mobile technology ▪ Involve executives in the selection of mobile talent management tools ▪ Static workforce management data or information sent via email, which may be accessed via mobile email devices 	<ul style="list-style-type: none"> ▪ Mobile devices are used to execute on HCM processes ▪ Use of mobility tools in HCM is at least partially standardized

Source: Aberdeen Group, June 2010

Best-in-Class Strategies

Given the emphasis placed on the need to respond to the varying needs and expectations of multiple generations in the workforce and the dispersed nature of many organizations today, it's not surprising that finding new communications channels topped the list for actions among Best-in-Class organizations (Figure 4).

Figure 4: Top Strategic Actions



Source: Aberdeen Group, June 2010

It is also important to note that of these Best-in-Class companies, 44% are currently using mobile devices for HCM activities, and another 33% plan to do so. Best-in-Class companies are 26% more likely than all other organizations to currently use mobile tools to facilitate HCM processes and workflows. By a wide margin, the top strategy employed by Best-in-Class

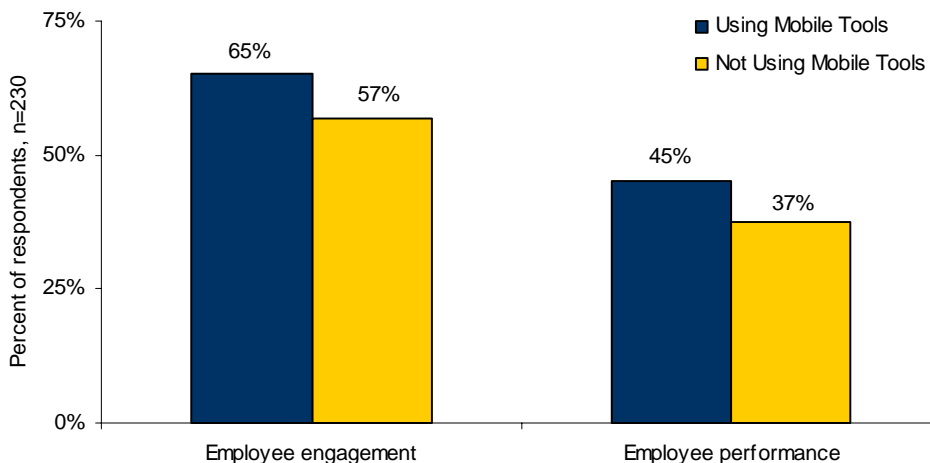
Fast Facts

- ✓ 44% of Best-in-Class companies are currently using mobile devices for HCM activities, and another 33% plan to do so
- ✓ Best-in-Class companies are **26% more likely** than all other organizations to currently use mobile tools to facilitate HCM processes and workflows

companies when it comes to their use of mobile devices, embodies a mindset around the use of mobility tools. Mobile devices are seen as not just an extension of collaboration, but as a new means to deliver messages in order to attract, retain, develop and manage people within the organization.

And Best-in-Class companies also focus on the role these devices can play in enhancing the customer experience. By engaging employees and ensuring they have the right skills and capabilities, and are scheduled in ways that they can interact with the right customers, organizations are looking to mobile devices to help them drive customer results. Aberdeen's March 2010 Research Brief on [Workforce Optimization](#) found that Best-in-Class companies saw 18% year-over-year improvement in customer satisfaction, versus 9% for all other companies (Industry Average and Laggards combined) and an 11% year-over-year improvement in employee satisfaction, versus 2% for all others (Figure 5).

Figure 5: Performance on Key Metrics



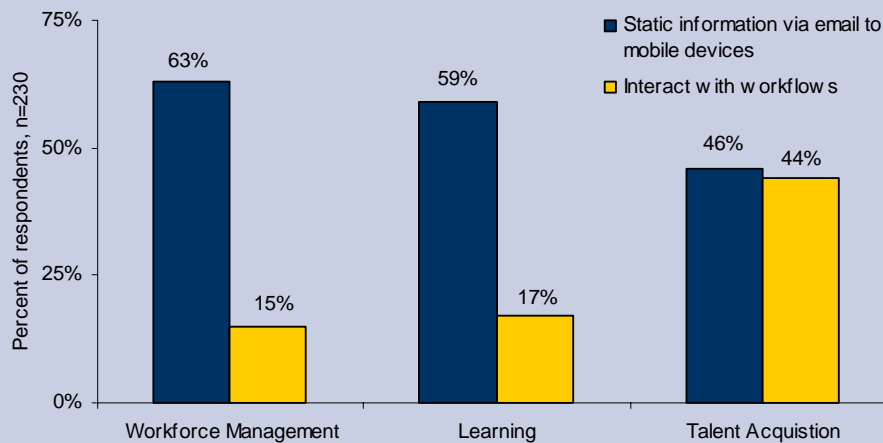
Source: Aberdeen Group, June 2010

Aberdeen's June 2009 study on [Web 2.0 Tools](#) found that organizations utilizing blogs, wikis and internal social networks demonstrated a 26% year-over-year improvement in employee engagement, and the results are even stronger for organizations utilizing mobile devices. In fact, organizations utilizing mobile devices in HCM report an average 65% of employees are highly engaged (based on employee self-ratings) - a figure that is 14% greater than organizations not utilizing mobile devices. And Aberdeen's July 2009 study on [Employee Engagement](#) found that Best-in-Class companies saw a 22% year-over-year increase in customer satisfaction, vs. 5% for Laggards and a 21% year-over-year increase in employee retention vs. 1% for Laggards. Finding new ways to enhance the employee experience, which ultimately will improve the customer experience, is a critical driver in the successful use of mobility tools in human capital.

Aberdeen Insights — Strategy

As illustrated previously in Figure 1, companies are looking to mobile devices to help them with workforce management, learning and talent acquisition activities. And while workforce management is the area where mobile tools are currently showing the most wide-spread adoption, the type of interaction around workforce management and learning data and/or processes is different than that seen among organizations using mobile devices in learning or talent acquisition. For organizations that indicate that they are currently using mobile devices in each of those three categories, we asked them to describe the main form of interaction, ranging from static data (data that can be viewed but not acted upon through the mobile device), to on demand information, to full mobile interaction with workflows (Figure 6).

Figure 6: Types of Mobile Interaction



Source: Aberdeen Group, June 2010

By far, the delivery of static information is the most commonly cited form of mobile interaction with any HCM process, but in the realm of talent acquisition, organizations are nearly as likely to offer full interaction with their recruiting workflows. As organizations look to move processes online, it's important to think about what type of interaction is required by the process. A manager is unlikely to use their mobile device to create a full week's worth of shift schedules, or to write the online description of a new course in the online learning portal. But where there are items in a workflow that require immediate action, and that can be acted upon without the need to access multiple other sources of data, those workflows should be considered for mobile workflows.

continued

Aberdeen Insights — Strategy

In talent acquisition, the approval of documents or individuals to move down the candidate pipeline or to respond to interview scheduling are prime examples of this. And in conversations with end users and vendors, the idea of surfacing just the right amount of detail that can be acted upon appropriately via mobile device is critical.

In the next chapter, we will explore in more detail how organizations are specifically using mobile devices in the areas of workforce management, learning and talent acquisition to improve business results.

Chapter Two: Benchmarking Requirements for Success

The selection of a mobile solution for HCM activities can have wide ranging impact, from improving workflows, creating efficiency, and improving engagement. The case below highlights all of these uses.

Case Study — Mobile Learning and Self-Service

A mid-sized, non-profit financial institution in the Midwestern and Northeastern United States has learned how to make mobile technology a significant player in improving employer brand and delivering a better learning experience throughout the enterprise. By tracking the impact of mobile learning and benefits over the past decade, this organization serves as an excellent example of how adding new means of accessing information can have a big impact on the employee.

Not only does the company itself have three geographically dispersed locations across the US, but the very nature of the business calls for much of the work to be conducted on the road. Add into this the fact that growing consolidation has led to an increase of at-home workers across the country, and the organization faces a trifecta of challenges that made a clear case for mobility. In response to these pressures, a strategy was put into place that focused on mobile solutions specifically for learning, business transactions, and communication. The actual approach was twofold. First, all new employees would be given the option of selecting either a laptop or desktop at the start of their job. A streamlined security infrastructure would allow for easy remote access to those that wish to work away from the office. Furthermore, staff members in particularly high-demand areas or with uniquely critical roles were issued Blackberries. And while this technology is frequently used for day-to-day business activities, their role related to human capital management focuses on two areas – learning and core HR.

From a learning perspective, the company found mobile access to be an integral part of their overall philosophy, which focuses on blended learning. By streaming baseline optional and mandatory learning content to mobile devices, they were able to start the process off on the right foot with a high level of participation. This would be followed by facilitated group discussion to drive the message home and maximize retention. According to the company's Vice President of Human Resources, "The value of mobile tools in this process is immeasurable. We recently rolled out a mandatory course on diversity and inclusion, and only by making that content available from anywhere were we able to set expectations to have everything completed in a timely fashion."

continued

Fast Facts

- √ **83%** of senior level executives and **77%** of mid-level managers at companies with mobile HCM efforts are using mobile devices to interact with talent data or workflows
- √ Organizations using mobility tools in HCM are showing a **13% year-over-year increase in manager productivity** versus a 6% improvement for organizations not using mobile technology

Case Study — Mobile Learning and Self-Service

They also found this medium effective for keeping people in the loop with regards to what they were working on. Using mobile notifications, the organization was able to incorporate a system of daily briefings that would only go out to those for whom the information would be relevant based on what projects the person is working on or what role they have in the organization. In addition to learning and communication, the company uses mobile access to make benefits information available to all employees. For the past year, they have been working with their HRMS vendor to maintain an employee self-service portal containing information about health benefits, disability, retirement, and life-insurance. The ability for all employees to access this information via any of their company-issued mobile devices has been well-received.

So far, the organization's mobile HCM strategy has paid big dividends. Not only has learning participation increased consistently each year, but the ability to access information from anywhere and at any time has become a hallmark of their message around work/life balance. "People are drawn to our company because they have the ability to be flexible in how they do their work," stated the company's VP of HR. "Because we can get information out to anyone when we need to, we're able to support our employee's needs to work from home or work flexible schedules. As a result, we feel we're able to attract great talent."

Competitive Assessment

Aberdeen Group analyzed the aggregated metrics of surveyed companies to determine whether their performance ranked as Best-in-Class, Industry Average, or Laggard. In addition to having common performance levels, each class also shared characteristics in four key categories:

- **Process:** the approaches they take to execute daily operations
- **Organization:** corporate focus and collaboration among stakeholders
- **Knowledge management:** contextualizing data and exposing it to key stakeholders
- **Technology:** the selection of the appropriate tools and the effective deployment of those tools

These characteristics (identified in Table 3) serve as a guideline for best practices, and correlate directly with Best-in-Class performance across the key metrics.

Table 3: The Competitive Framework

	Best-in-Class	Average	Laggards
Process	IT and HR collaborate around requirements to support mobile technology		
	38%	34%	30%
Organization	Involve IT in the vetting and selection of mobile HCM solutions		
	48%	45%	29%
	Involve executives in the selection of mobile talent management tools		
	30%	30%	5%
Knowledge	Static workforce management data or information sent via email, which may be accessed via mobile email devices		
	67%	67%	54%
Technology	Mobile devices are used to execute on HCM processes		
	44%	36%	33%
	Use of mobility tools in HCM is at least partially standardized		
	76%	66%	48%

Source: Aberdeen Group, June 2010

Capabilities and Enablers

The use of mobile devices to interact with HCM data and workflows is obviously an area of emerging use. People are using these technologies to accomplish real work and are seeing real results, but it is not a given that every organization today is using mobile technology in this way. As a result, when looking at Best-in-Class differentiation there is still quite a bit of variability. But the research does indicate that companies that are using mobile technology for HCM are 24% more likely to be Best-in-Class performers. The following sections of this report will discuss key capabilities supporting the successful implementation of mobile tools for HCM, but will focus mainly on the performance benefits of using these tools overall, calling out Best-in-Class capabilities and practices where appropriate.

"From a learning perspective, we found that people reacted more favorably once we introduced it on a mobile platform."

~ Benny Ramos, Manager of HR, TELUS

Process

When it comes to the processes that support the use of mobile technology in HCM, the most differentiated among Best-in-Class companies was to have a process in place to ensure IT and HR collaboration. This is an important lesson to keep in mind, as organizations often have mobility efforts already in place in other parts of the business, and being able to build upon those efforts can boost adoption and even ensure that HCM capabilities are even supported. And if critical business processes like scheduling, learning and talent acquisition are pushed out onto mobile devices without proper support in place, if any technological issues do arise,

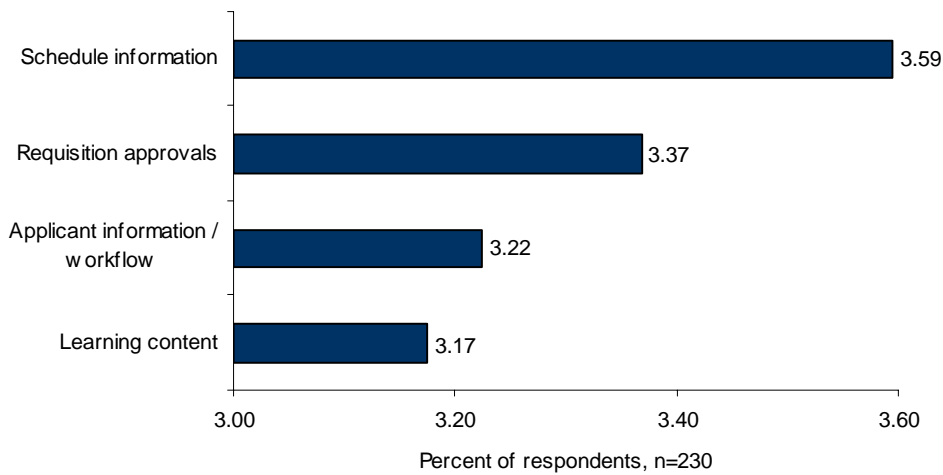
the lack of IT support could derail even the best efforts. While the pressures to use mobile technology for HCM focus on changing how the organization communicates and opening up new channels, it is important not to forget the IT partners who will need to support this new functionality.

While it was not a Best-in-Class differentiator, one other process capability is worth mentioning. The capability that was cited most often by all organizations utilizing mobile technology for HCM was having a process in place to secure data on mobile devices, cited by 45% of all users. Securing data also included having the ability to delete data upon loss or theft of mobile devices. Security is a top concern with all mobile devices that have access to personal information. Laws around the globe offer various protections to employees regarding their personal data, and organizations must ensure that their mobile HCM solutions are in compliance with all of these laws. The decision on whether mobile devices actually house personal information, or if they simply offer access to it through a browser are things to consider when exploring mobile HCM solutions, as is the ability to erase or shutdown those devices if needed.

Organization

The most cited capability by Best-in-Class organizations was to involve IT in the vetting and selection of mobile HCM solutions. This supports the previous process capabilities as well, ensuring that IT stays involved after requirements have been defined and security issues addressed. For HR leaders, the ability to articulate the value proposition for mobile HCM will be a critical organizational hurdle to address to not only gain buy-in from IT, but also corporate executive leadership. This executive-level buy-in is critical especially considering that 83% of senior level executives and 77% of mid-level managers at responding companies with mobile HCM efforts are using mobile devices to interact with talent data or workflows. And, when asked which types of mobile functionality were most important for managers and leaders to have access to, schedule information, talent acquisition workflows, and learning content for their own development topped the list (Figure 7).

Figure 7: Information Managers Should Access via Mobile



Source: Aberdeen Group, June 2010

Knowledge Management

Knowledge management is really at the heart of mobility efforts in HCM. These efforts are all about surfacing information in order to make better decisions, execute more efficiently, and drive performance. As mentioned in Chapter One, workforce management is the area experiencing the broadest current application of mobility tools, and indeed 67% of both Best-in-Class and Industry Average organizations indicate they are able to surface static workforce management data, including schedules, to mobile devices. But while workforce management seems to top the list for now, the three processes cited in Figure 1 are all areas where mobility tools are gaining traction. Aberdeen investigated each of these processes to try and better understand what information or activities were best fit for mobile tools.

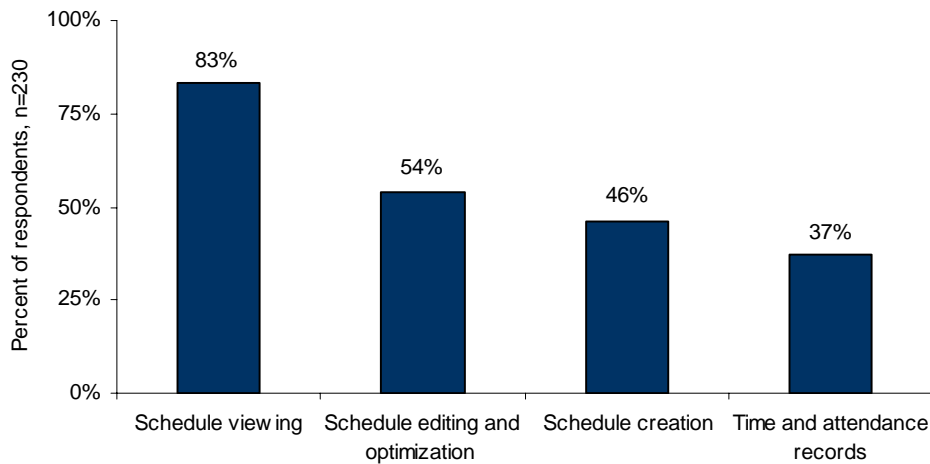
Workforce Management

Scheduling activities dominate when it comes to workforce management activities currently conducted on mobile devices. Given the time that many managers spend on scheduling and resolving schedule issues, this focus is not surprising. The data collected shows that organizations using mobility tools in HCM are showing a 13% year-over-year increase in manager productivity versus a 6% improvement for organizations not using mobile technology. This type of streamlining is likely part of the reason why. And as indicated previously, the static display of schedule information is the most common use, but among organizations using mobility tools specifically for workforce management activities, functionality that allows for schedule editing and even creation are also being used (Figure 8).

Fast Facts

- √ Organizations using mobility tools in HCM are showing a **13% year-over-year increase in manager productivity** versus a 6% improvement for organizations not using mobile technology

Figure 8: WFM Activities on Mobile Devices



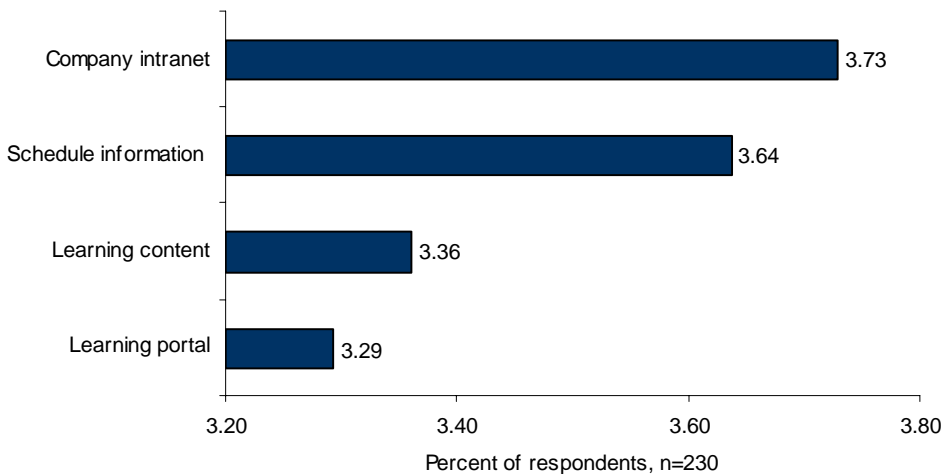
Source: Aberdeen Group, June 2010

It is somewhat surprising that viewing and editing time clock entries, or schedule exceptions did not rank higher on the list, coming in at 15% and 27% respectively. These types of workflow activities are ones that can often be resolved quickly and in many desktop workforce management solutions are a "one-click" type of function. As organizations look to add new mobile functionality, this may be one area to explore as a way to improve workflows.

Learning

The ability to access information - from company information to schedules to learning content - is a critical driver behind providing mobile access. Figure 9 illustrates the type of information that organizations feel is important to have access to via mobile interfaces.

Figure 9: What Employees Should have Access to via Mobile

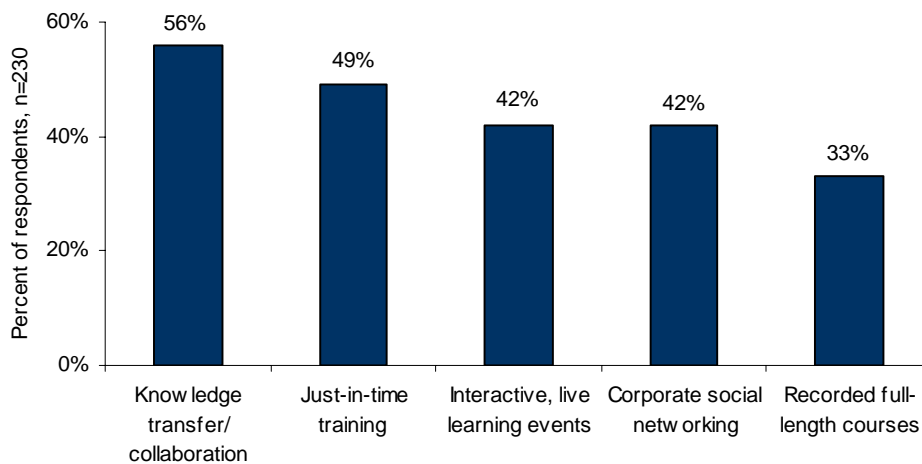


Source: Aberdeen Group, June 2010

Learning, collaboration and knowledge transfer have long been areas impacted by emerging technologies. As the Internet grew in adoption, organizations looked to leverage it to share information, enhance learning modules, and connect people in new ways. Similarly, with the rise of mobile technologies, using them to enhance connections to improve the flow of information and learning is a top priority. What is interesting are the types of learning activities currently conducted via mobile devices.

Blended learning - the use of both formal and informal, and in-person and technology enabled learning - is on the rise, according to Aberdeen's October 2009 study on [Learning & Development](#) for front-line and mid-level managers. Sixty-six percent (66%) of Best-in-Class organizations cited blended learning as one of the approaches they use for mid-level managers, with another 21% indicating plans to do so. And specifically, mobile learning was cited by 32% of organizations as an area planned for front-line manager learning and 30% of organizations for mid-level manager learning. The data from the current study breaks down what types of learning are currently conducted via mobile devices more specifically (Figure 10).

Figure 10: Learning/Collaboration Activities Conducted via Mobile



Source: Aberdeen Group, June 2010

Informal interactions to identify and connect with subject matter experts, find information quickly, and collaborate on projects are the types of activities most commonly conducted. In addition, the use of short, content-based learning modules to address just in time learning needs or "how-to?" questions were cited by nearly half of users. Think of the field service technician who needs a refresh on replacing an uncommonly used part accessing a video on a mobile device to guide them through the process, saving an extra trip back to resolve a customer issue. To that point, Aberdeen's March 2009 research on [Service Contract Management](#) found that the average cost of a technician truck roll (across all industries and geographies) to be \$276. The cost savings generated by eliminating some of these second trips can multiply quickly. Enhancing the customer experience

was a top three action identified by Best-in-Class organizations, and using mobile devices to deliver training and information to employees when it can make a difference for the customer is a big part of executing that strategy.

Case Study — Mobile Learning at TELUS

TELUS is a communications company providing data/IP, TV, and wired and wireless phone service. Although based in Canada, the company has roughly 38,000 team members spanning across North America, Asia, Latin America, and the UK. In addition to having a globally dispersed workforce, TELUS employs a large number of field service professionals to do repairs and installations for both business and residential customers. With such a large employee population operating away from the central office at any given time, the company felt it necessary to find an effective way of not only passing along critical learning content and information, but facilitating communication between employees of any role anywhere in the world.

For several years, TELUS has had a basic mobile infrastructure in place, especially on the hardware side. Management and sales staff are given laptops, field service agents are issued ruggedized tablets, and many of the employees are connected via smartphones ranging from Blackberries, to iPhones, to Windows Mobile and Android phones. However, with the exception of a subscription to an off-the-shelf reference provider for mobile learning and development, the software wasn't in place yet. But throughout the past 3 years, they began introducing new capabilities one-by-one. This started with customized podcasts, whose primary use is to provide learning content to sales professionals and field technicians, but can also be created by individual team members and made available internally. Shortly after these were introduced, TELUS invested in an internal wiki and blogging site, as well as micro-blogging and status capabilities which can be accessed and updated via mobile device, to help in the formation of networks and knowledge communities. And lastly, they are in the process of sourcing video creation tools, so that individuals can upload relevant video content from their cell-phone cameras, webcams, camcorders, and other devices in the spirit of sharing best practices.

Since implementing these initiatives last year, the company has already seen significant growth in participation. According to Benny Ramos, Sr. Learning Consultant -HR at TELUS, "From a learning perspective, we found that people reacted more favorably once we introduced it on social platforms accessible by mobile. Some people just don't like spending set blocks of time in a classroom, and we found that people tended to prefer accessing content in smaller, bite-sized pieces." Not only has mobile learning taken off, but micro-blogging transactions have increased as well.

continued

Case Study — Mobile Learning at TELUS

In just one year, it went from 50 people in the initial pilot group to 3,600 people making regular contributions. However, while the results have been promising, there is still more work to be done. The biggest change that is on the horizon is a hardware and software consolidation. From the hardware side, the organization plans to gradually move towards one smartphone platform to simplify the process of purchasing or designing applications that can be accessed by everyone. On the software side, TELUS relies on a decision-making body called Adoption 2.0 – a group of leaders formed last year to represent different parts of the business. This group will be looking at different mobile and social applications to determine which ones fit best and which can be streamlined or consolidated for increased efficiency. Furthermore, the team plans on putting in measures to track exact changes in engagement and performance as a result of mobile learning and networking. The idea of “Learning 2.0” at TELUS is about incorporating formal, informal and social opportunities to, and promote a culture of collaboration. But even though this isn’t in place yet, the company feels confident that their strategy has made a huge difference in bringing together a workforce of different people, in different roles, and in different locations all over the world.

Talent Acquisition

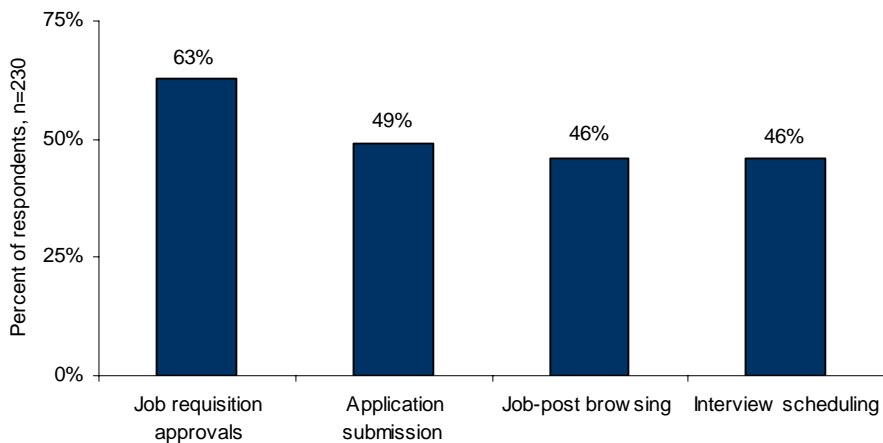
The number one strategy among Best-in-Class organizations was all about opening up new ways of interacting with current and potential future employees. Aberdeen's August 2009 study on [Talent Acquisition](#) found that to support their organic growth goals, Best-in-Class organizations are 39% more likely than all others (the combination of Industry Average and Laggard organizations) to focus their efforts on actively building and nurturing their candidate pipelines. Mobility tools are one of the ways that organizations are able to build and expand their reach into key talent pools to further these efforts. Among the organizations utilizing mobile tools specifically for talent acquisition, the top four goals identified were:

- Improving time to productivity (by selecting best-fit candidates)
- Expanding the reach of recruitment efforts
- Reducing manual transactions
- Improving the employer brand among potential candidates

In conversations with end users, having mobile apps for recruiting, sending out text messages or podcast with branding messages and having a smartphone optimized applications were considered by organizations to simply have the "cool factor." But given shifting demographics, many organizations, particularly in industries that do a lot of volume hiring, are starting to see these new channels as a way to differentiate themselves and tap into new labor pools. Organizations are doing more than branding and attracting

through mobile tools. One of the most prevalent ways that organizations are using mobile devices is to streamline workflows in the hiring process. By pushing messages to managers to approve requisitions, give a "thumbs up" or "thumbs down" to a resume, scheduling interviews, or provide interview feedback by mobile device, the workflow can be sped up and made more effective. It is a mix of these external communication efforts along with workflow optimization that top the list of how companies are using mobile functionality for talent acquisition today (Figure 11).

Figure 11: Talent Acquisition Activities Conducted via Mobile



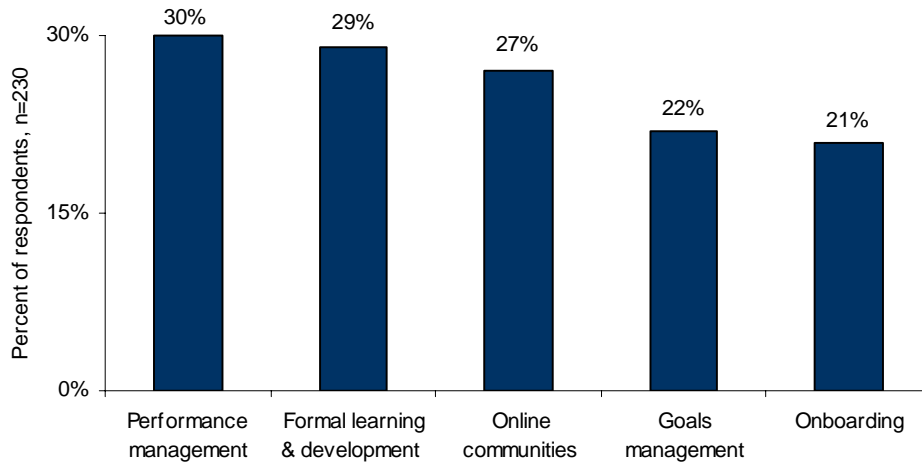
Source: Aberdeen Group, June 2010

Organizations using mobile devices as part of their talent acquisition activities are also seeing results, with 57% of respondents who track the impact of their mobile recruiting efforts saying they had improved the quality and/or size of their talent pool as a result of their efforts.

Technology

The use of this one technology - mobile devices - within HCM is driving results in several key areas. And at 44% usage, organizations achieving Best-in-Class status are 26% more likely than all other organizations to currently use mobile tools to facilitate HCM processes and workflows. Expanded usage of mobile tools for HCM purposes is planned by all organizations, but Best-in-Class companies are leading the way here as well, with an additional 33% indicating they plan to go mobile, as compared to 24% of all others. While workforce management, learning and talent acquisition activities top the list of mobile enabled processes overall, when it comes to planned expansion, other elements of talent management are coming to the forefront (Figure 12).

Figure 12: Planned Expansion of Mobile Activities



Source: Aberdeen Group, June 2010

Performance management tasks were cited by 30% of organizations as a planned area of expansion for their use of mobility tools in HCM. Both users and technology vendors are already demonstrating some of this capability with the use of tools that capture short, immediate feedback throughout the year and roll that information up into the formal review process. The key for successful solutions will be in balancing the "wow factor" of what types of information and activities can be presented on mobile devices, and which ones truly add value in impacting business metrics.

This type of technology adoption also has inherent challenges due to the wide variety of devices that fall into the category of "mobile." When asked about the standardization of their use of mobile tools for HCM activities, 83% of users indicated that their efforts were only partially or not at all standardized. This means that in the vast majority of organizations, a mix of company supported and personal devices are being used to interface with HCM data and processes. This lack of standardization can be a challenge and an opportunity for organizations. The number one barrier among non-users to adopting a mobile strategy for HCM was a lack of funding for technology investment. But if the end-user device being used to access data does not need to be supplied or maintained by the organization, it may help defray some of the costs. However, how data is handled, and security issues must be addressed on the back end when the company does not own or control the device on the user side. This wide variability also points to the need to have multiple interfaces with the data. Just over half (55%) of all current users indicated a preference for mobile HCM solutions that can surface data and workflows to any device through universal technologies like html browsers and SMS text messages. This kind of interoperability is a key point to remember when evaluating mobility solutions.

Aberdeen Insights — Technology

When it comes to emerging technologies, or the application of technologies to new parts of the business like mobile tools for HCM, there are still a lot of unanswered questions, and often early adopters are those that have the capability to try things on their own, regardless of solutions that are commercially available. And indeed, 28% of survey respondents indicated that their mobile HCM solutions are homegrown applications that pull data from existing workforce or talent management solutions. Another 38% are using commercially available third party solutions to surface HCM data to mobile devices or using mobile functionality built into existing systems. But in the future, organizations indicate that they plan to move away from home grown solutions. As a result, they will continue to look to the marketplace to offer new options to make HCM data and processes both available and actionable on mobile devices.

Chapter Three: Required Actions

Whether a company is trying to move its performance in human capital from Laggard to Industry Average, or Industry Average to Best-in-Class, the use of mobile devices can have an impact. Given the nascent nature of this technology, the following actions are divided among those who are making their first foray into mobile HCM, and those who may be looking to enhance their usage.

Fast Facts

- √ **30%** of organizations cited performance management as an area where they plan to use mobile functionality in the future

Starting Out Steps to Success

- **Start with the needs of the business.** Like the adoption of any technology or solution, careful consideration should be given to the needs and priorities of the business when determining where to begin efforts. If the company has a focus on recruiting, think about mobile talent acquisition as the place to start. If the business relies heavily on an intricate schedule of various job roles required to operate day-to-day, mobile scheduling may be the place for you. By focusing on a true pain-point for the business, getting buy in from leaders and IT will be made easier.
- **Consider the IT Implications.** Collaboration between HR and IT on requirements and vendor sourcing were top capabilities cited by organizations achieving success with mobile tools. And this collaboration should continue to grow at a rapid pace as 45% of responding organizations indicated the involvement of IT in the vetting and selection of mobile HCM solutions as a top planned capability. Make sure not to select a solution in a vacuum to ensure that there are not conflicts with existing technology, and to make sure that there is IT support during roll out and operations.
- **Security is a must.** The flow of data across the information superhighway is an amazing advance, but it comes with risks. Not only is information being sent between and across enterprises vulnerable to electronic theft, mobile devices add the element of physical theft as well. Currently, 43% of organizations with mobile HCM tools have a process in place to ensure data security on mobile devices, and another 30% plan to do so. When considering any mobile solution that interacts with personal employee information, whether home grown or commercially available, ensure that the security implications and features are understood and in compliance with local laws as well as company policy.

Current User Steps to Success

- **Move from data viewing to workflow interaction.** Right now, mobile devices are mostly serving up static information, with 63% of workforce management mobile solutions users indicating they only have access to static information. This can be incredibly valuable,

but to continue to add value organizations should look at what other workflow actions can be surfaced to mobile devices as well. Viewing a presentation on coaching as part of a development plan as a podcast via Smartphone is useful, but so is a manager being able to approve a course selection request from a team member.

- **Balance what can be done with what should be done.** Like so many technologies, just because something can be done on a mobile device doesn't mean it should be. It might be possible to scroll through four resumes for a job opening on a Smartphone and email feedback to a recruiter, but it is likely not the ideal medium for all resume vetting. Think about the pieces of a workflow that can be acted upon quickly, and without a lot of additional information that must be accessed when determining what new features and functionality to add.
- **Think about mobile performance management.** As indicated above, 30% of organizations cited performance management as an area where they are looking to expand their use of mobile technology in HCM. Mobile devices are an ideal way to collect ratings and short feedback in the moment, and this type of input can be invaluable in the performance management process. Not only can it foster the frequent and informal feedback that Aberdeen's July 2009 research on [Employee Engagement](#) found to be so beneficial, but it can also give a more rounded view of an individual at review time. And documenting performance related events in real time can be particularly important for field or remote employees for two key reasons. One, given that they may not physically interact with peers and managers on a daily basis, it can be easier to forget to document performance-related events as they occur. And two, this population is likely to be using mobile devices already for other business tasks, so it makes sense to include HCM activities on the same device as well.

Aberdeen Insights — Summary

Mobile devices are not new to most employees, which is one of the reasons that using them in new ways to support HCM efforts can be so successful. As technology has changed the way every workforce and talent management process is executed, putting the tools to interact with those HCM technologies in the hands of employees is an exciting proposition. As users and vendors find ways to send important data to the employees that need it, both the employer and the employee can benefit. By being able to resolve schedule issues quickly and efficiently through mobile data exchanges, the individual employees involved have their needs met, and the organization's goals of ensuring coverage are hit as well.

continued

Aberdeen Insights — Summary

By reaching a hiring manager to schedule an interview with a top prospect, the hiring workflow is expedited and the potential new hire is treated in a responsive manner, enhancing the candidate experience. And the commuter who is able to take a training course while on the train on a Tuesday morning is able to make good use of his or her time while hitting organizational training goals.

Mobile devices may not be the next frontier, but their continually growing functionality, and the application of that functionality to HCM processes is. As the attention of users shifts increasingly to their mobile devices, organizations should capitalize on this trend to gain all of the productivity and performance gains cited in this research. Organizations should be looking at all of their HCM processes to evaluate what elements can be enhanced by mobile interaction.

Appendix A: Research Methodology

Between April and June 2010, Aberdeen examined the use, the experiences, and the intentions of more than 220 enterprises using mobile technology in a diverse set of HCM functions.

Aberdeen supplemented this online survey effort with interviews with select survey respondents, gathering additional information on mobile HCM strategies, experiences, and results.

Responding enterprises included the following:

- *Job title:* The research sample included respondents with the following job titles: CEO / President (10%); EVP / SVP / VP (10%); Director (23%); Manager (27%); Consultant (10%); and other (21%).
- *Department / function:* The research sample included respondents primarily from Human Resources, Talent Management, or Recruiting roles (48%), with the remainder coming from IT (9%); Corporate Management (7%); Business Development (6%); and other (30%).
- *Industry:* The research sample included respondents from the following industries: Public-sector (14%); Software (12%); Healthcare (10%); Financial Services (7%); IT / Consulting (7%); Retail (6%); Insurance (4%); and other (40%).
- *Geography:* The majority of respondents (80%) were from North America. Other respondents were from Europe (10%) or the Asia-Pacific region (7%), with the remainders in the Middle East / Africa or South America / Caribbean.
- *Company size:* Thirty-five percent (34%) of respondents were from large enterprises (annual revenues above US \$1 billion); 33% were from midsize enterprises (annual revenues between \$50 million and \$1 billion); and 33% of respondents were from small businesses (annual revenues of \$50 million or less).
- *Headcount:* Sixty-two percent (62%) of respondents were from large enterprises (headcount greater than 1,000 employees); 18% were from midsize enterprises (headcount between 101 and 1,000 employees); and 20% of respondents were from small businesses (headcount between 1 and 100 employees).

Study Focus

Responding executives completed an online survey that included questions designed to determine the following:

- √ Current and planned use of mobile technology to support human capital management functions
- √ Specific mobile devices or mobile software being supported
- √ Specific employee groups and activities targeted by mobile HCM strategies
- √ The benefits, if any, that have been derived from leveraging mobile technology in HCM

The study aimed to identify emerging best practices for mobile technology usage in human capital management, and to provide a framework by which readers could assess their organizations' mobile strategies.

Table 4: The PACE Framework Key

Overview
<p>Aberdeen applies a methodology to benchmark research that evaluates the business pressures, actions, capabilities, and enablers (PACE) that indicate corporate behavior in specific business processes. These terms are defined as follows:</p> <p>Pressures — external forces that impact an organization’s market position, competitiveness, or business operations (e.g., economic, political and regulatory, technology, changing customer preferences, competitive)</p> <p>Actions — the strategic approaches that an organization takes in response to industry pressures (e.g., align the corporate business model to leverage industry opportunities, such as product / service strategy, target markets, financial strategy, go-to-market, and sales strategy)</p> <p>Capabilities — the business process competencies required to execute corporate strategy (e.g., skilled people, brand, market positioning, viable products / services, ecosystem partners, financing)</p> <p>Enablers — the key functionality of technology solutions required to support the organization’s enabling business practices (e.g., development platform, applications, network connectivity, user interface, training and support, partner interfaces, data cleansing, and management)</p>

Source: Aberdeen Group, June 2010

Table 5: The Competitive Framework Key

Overview	
<p>The Aberdeen Competitive Framework defines enterprises as falling into one of the following three levels of practices and performance:</p> <p>Best-in-Class (20%) — Practices that are the best currently being employed and are significantly superior to the Industry Average, and result in the top industry performance.</p> <p>Industry Average (50%) — Practices that represent the average or norm, and result in average industry performance.</p> <p>Laggards (30%) — Practices that are significantly behind the average of the industry, and result in below average performance.</p>	<p>In the following categories:</p> <p>Process — What is the scope of process standardization? What is the efficiency and effectiveness of this process?</p> <p>Organization — How is your company currently organized to manage and optimize this particular process?</p> <p>Knowledge — What visibility do you have into key data and intelligence required to manage this process?</p> <p>Technology — What level of automation have you used to support this process? How is this automation integrated and aligned?</p> <p>Performance — What do you measure? How frequently? What’s your actual performance?</p>

Source: Aberdeen Group, June 2010

Table 6: The Relationship Between PACE and the Competitive Framework

PACE and the Competitive Framework – How They Interact
<p>Aberdeen research indicates that companies that identify the most influential pressures and take the most transformational and effective actions are most likely to achieve superior performance. The level of competitive performance that a company achieves is strongly determined by the PACE choices that they make and how well they execute those decisions.</p>

Source: Aberdeen Group, June 2010

Appendix B: Related Aberdeen Research

Related Aberdeen research that forms a companion or reference to this report includes:

- [*Employee Performance Management: The Alpha and the Omega of Talent Strategy and Business Execution*](#); May 2010
- [*Workforce Optimization: Managing the Quality, Cost and Speed Paradox*](#); March 2010
- [*Talent Assessment Strategies: A Decision Guide for Organizational Performance*](#); March 2010
- [*Benefits Management 2010: Streamlining Processes and Empowering Employees*](#); February 2010
- [*Onboarding: The First Line of Engagement*](#); February 2010
- [*Strategic Workforce Planning: Winning Scenarios for Uncertain Times*](#); January 2010
- [*Integrated Talent Management: Improving Business Results through Visibility and Alignment*](#); December 2009
- [*Retail Workforce Optimization: Establishing the Customer-Centric Store-Level Employee*](#); December 2009
- [*Learning & Development: Arming Front-line and Mid-level Managers to Deliver People and Performance Results*](#); October 2009

Information on these and any other Aberdeen publications can be found at www.aberdeen.com.

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