Identify HR information requirements

Overview

The role of information systems for human resource management has evolved rapidly in the last decade.

Human Resource Management Information Systems (HRMIS) today reflect the need for organisations to respond to change. In identifying information requirements it is essential to consult with management about corporate objectives and management needs and also to consider whether streamlining current systems and automating current processes is a viable alternative or accompaniment.

Identifying requirements involves broad research and focused analysis. Findings are documented and agreed with management and staff who have participated in the process.

Key terms

Analysis
The process of objectively examining a set of information against a predetermined set of criteria.

HRMIS
Human Resource Management Information System; computer systems to collect and analyse information to assist in the making of timely HR management decisions, examples are databases, spreadsheets, information networks. Also known as HRIMS, HRIS and HRMS.

Human Capital Management
This term is used to describe processes, procedures and software systems used to manage people in the workplace.

Research
The process of investigating and exploring a topic or area of concern in order to reveal information for analysis.

The role of HRMIS

The role of HRMIS varies from organisation to organisation. The traditional role was to automate such functions as payroll and annual leave.

In large organisations HRMIS is now seen as a means for strategic and operational management and planning and includes:

- Career planning and appraisals
- Deploying the right people to fulfil profit, growth and product strategies.
- Distribution of the HRMIS functions to line management and self-service by employees.
- Salary and leave administration

The role of analyst/researcher and client

You need to be clear about the role of analyst/researcher and the role of the client. Regardless of whether you are conducting research within your own organisation or for an external organisation, you must distinguish the roles.

As an analyst/researcher you must deal with clients who want you to arrive at an objective report based on interviews, research and analysis. Think of yourself as objective in your views and your clients, the people you report to and the people you interview as subjective in their views.

To determine the role of HRMIS in an organisation you must identify the requirements of the organisation (management clients) and the users (staff clients) of the system. You need to collect as much information as possible according to a set of objectives and within a defined scope.

To determine objectives and scope some preliminary fact-finding is required. This is a stage where the answers to questions can lead to more questions!

The best way to start this preliminary process is to interview management about their objectives and scope for the project.

What information do you need?

You need to specify the areas in which you need information. There’s a suggested template below for determining these areas. It’s a generic template that you might want to adapt to suit.
Table 1: Generic information gathering template (2 cols)

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background of the organisation or business:</td>
<td></td>
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<tr>
<td>Objectives of this exercise:</td>
<td></td>
</tr>
<tr>
<td>Criteria for successful achievement of objectives:</td>
<td></td>
</tr>
<tr>
<td>Problems:</td>
<td></td>
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<tr>
<td>Issues, factors and information that impinge on the problem:</td>
<td></td>
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<tr>
<td>Resources available to address the problem:</td>
<td></td>
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<tr>
<td>Possible strategies for addressing the problem:</td>
<td></td>
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<tr>
<td>Plan of action to be implemented:</td>
<td></td>
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<tr>
<td>Feedback process:</td>
<td></td>
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<tr>
<td>Plans for the future:</td>
<td></td>
</tr>
<tr>
<td>Budget:</td>
<td></td>
</tr>
<tr>
<td>Project scope:</td>
<td></td>
</tr>
<tr>
<td>Project specifications:</td>
<td></td>
</tr>
<tr>
<td>Project timelines:</td>
<td></td>
</tr>
<tr>
<td>Other comments:</td>
<td></td>
</tr>
</tbody>
</table>

Note: If the client’s request involves more than one problem, you may need to fill out one of these templates for each problem.

Try it

In your own situation, or area of study at present, is there a client whose needs you are required to determine? If so,

- Does the above template suit this task?
- Would you need to remove any of the headings?
- Would you need to add others?
- Modify the template to suit your own situation.
- Use the modified template to obtain the information you require.
How to analyse requirements

Suppose you’ve determined your requirements. You’ve collected the information that’s on the template we’ve just looked at. You’ll now look at that information and ask yourself questions such as:

- Does the client know exactly what they want?
- Is there anything I need to research to help the client make a more informed decision?
- Would I be able to meet the client’s requirements?

In other words, you analyse what the client has said their requirements are.

You might then decide to carry out research on the subject. You might find that there are other ways of solving the problem than what you or the client had decided. Your research may involve anything from consulting other people in your organisation to reading up on the subject (eg on the Internet and in journals).

You might find a template such as the one below useful for noting down your analysis. Again, it’s a generic template that you could adapt or elaborate on.

Table 2: Requirement analysis template (2 cols)

<table>
<thead>
<tr>
<th>Analysis</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>What the client requires (to resolve the problem):</td>
<td></td>
</tr>
<tr>
<td>Other methods for resolving the problem:</td>
<td></td>
</tr>
<tr>
<td>Advantages and disadvantages of each method:</td>
<td></td>
</tr>
<tr>
<td>Recommendation (if any) and reasons for recommendation:</td>
<td></td>
</tr>
<tr>
<td>Implications for initial budget, timelines, etc:</td>
<td></td>
</tr>
<tr>
<td>Other comments:</td>
<td></td>
</tr>
</tbody>
</table>

Try it

Modify the above template to suit your own requirements, as you did in the previous activity, and then use it to analyse your client’s needs.
Information you need to provide to your clients

You’ve analysed your client’s requirements. You then:

- Tell the client whether you (or your organisation) would be able to meet their requirements.
- Let them know of other options or possibilities of which they had not been aware.
- Provide the client with any information that will help them understand what they’re getting into before you go ahead with the job (or project).

Information you and your client need to agree to

It’s important that you gather the correct information from a client so that you can accurately determine their requirements. It’s just as important that:

you provide the clients with information that will help them make an informed decision

you and your client agree on certain decisions (eg the specifications of the job and the scope of the job).

You would not want a client to say at a later date that they were not satisfied with the service you provided. You also would want to pre-empt any later misunderstandings (which was what had happened in the restaurant booking case study). Finally, you would want to make sure that your organisation is not taken to court!

Types of information you should document

Listed below are some of the types of information that will need to be ascertained from the outset of the job or project. You may need to provide some of this information to the client as they are part of your organisation’s policies—eg your organisation may have a policy for charging predetermined extra fees and other charges for certain services outside of the service requested by the client. Some of the other information would need to be agreed to and understood by the two of you.

Extra costs

It’s important to ensure that the client is fully aware of how much they would need to pay and for what service. Are there any extra costs that could be incurred by the client? Are there any extra charges or penalties the client could be asked to pay?
Scope of the job

Both you and the client should agree on exactly what you are supposed to do. They should know what they have to provide. What are the parameters of the job (or project)? Exactly what lies outside the brief?

Specifications

It’s important to spell out the details that you will need to attend to in order to do the job. (For example, if you’ve been contracted to publish a company brochure, spell out the exact size, colours, paper thickness, fonts, etc.)

Agreement or contract

Is there a document such as a service level agreement?

Changing of the brief

Sometimes half-way through a job, a client may want to change their original brief. Is there a deadline for changes to the brief? Which specifications can be changed? Is there a penalty?

Options

Let the client know what their options are. Provide information on the features of each option.

Possibilities

The client may make a request for a certain service or product. However, they may not be aware of other options or other possibilities.

Recommendations

Is it your organisation’s policy to give recommendations to the client? Sometimes clients request that you do. Make sure you carry out research.

Process

The client needs to be aware of the processes you’ll take when carrying out the client’s request. Is the client part of this process? Will they be consulted? When will they be consulted?
Roles

It’s important to clarify the roles of everyone on the job. What is your role? What is their role? What are the roles of each person on the project?

Consultation with the client

Will the client be consulted? At what stages of the job or project will this consultation occur?

Contact person

Can the client contact you or someone in the organisation if they have queries?

Timelines

What are the dates for the completion of the job (or various parts of the job)? Will there be penalties if deadlines are not met?

Job guarantee

Is there a job guarantee? If the client is not satisfied with the service, is there recourse (someone or a regulatory body they could contact perhaps)?

Once you have agreed on this information, it would be a good idea to put it down in writing. It could simply be in the form of a letter to the client where you say something like:

‘Below are the decisions we made and agreed to at our meeting on….’. Or it may be in the form of a contract or service level agreement.

Think

Think of contracts for projects such as building or renovating a house or buying or selling property. What misunderstandings and lawsuits could arise between the two parties if contracts were non-existent or were poorly written?
Feedback to activity

There are lots of possibilities here! Obviously, you might get a completely different house from the one you expected, and it might cost you ten times as much as you thought.

Skills required for determining and analysing client requirements

Below are some key skills you need when determining and analysing client requirements.

- Use active listening strategies.
- Sort and sift information received from the client.
- Use effective questioning skills.
- Research a range of possibilities.
- Communicate regularly with the client.

You should already have had practice at listening and questioning techniques. We’ll quickly review these techniques here.

Key principles of active listening

In being an active listener, you encourage the speaker to talk freely. However, be aware of spending too much time discussing what is not relevant to the task at hand. Below are more principles of active listening that aim to encourage the speaker.

Table 3: Principles of active listening (2 cols)

<table>
<thead>
<tr>
<th>Principles</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do more listening than talking</td>
<td>Give the other person time to talk. Show that you are interested in what they have to say.</td>
</tr>
<tr>
<td>Show encouragement</td>
<td>Use non-verbal as well as verbal cues to show you are listening. For example, maintain eye contact, nod, sit upright and say ‘yes’ or ‘I see’ at appropriate places, and use a positive tone of voice.</td>
</tr>
<tr>
<td>Avoid appearing tense</td>
<td>For example, avoid sitting with arms and legs tightly crossed and speaking in a hurried and agitated tone of voice.</td>
</tr>
<tr>
<td>Try not to agree or disagree right away</td>
<td>If you feel you have to disagree, wait until the other person’s explained and then disagree but provide reasons for your stand.</td>
</tr>
<tr>
<td>Show empathy</td>
<td>Imagine yourself in the other person’s position. Respond to their feelings.</td>
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<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Be ‘other-directed’</td>
<td>In other words, don’t project your feelings or ideas on them.</td>
</tr>
<tr>
<td>Be accepting of the other person</td>
<td>This means being non-judgemental and non-discriminatory.</td>
</tr>
<tr>
<td>Be non-defensive</td>
<td>Instead, admit any errors or oversights on the part of yourself or your organisation and apologise for that.</td>
</tr>
<tr>
<td>Paraphrase (summarise) what the speaker is saying</td>
<td>In other words, restate key facts, issues, perceptions and interpretations. When you receive a client request, even a simple one, it’s important to check that you’ve understood it correctly.</td>
</tr>
<tr>
<td>Be aware of the other person’s sensitivities</td>
<td>If you need to ask questions of a sensitive nature, ask them in a gentle, polite and supportive manner and tone of voice. Assure confidentiality. Wait for the right time to ask as well—that is, when the other person is relaxed and you have gained their confidence.</td>
</tr>
<tr>
<td>Reflect every now and again on what the other person is saying</td>
<td>For example, you might say: ‘So you were quite upset by that behaviour because you felt that it was quite unfair?’ This shows the other person that you understand how they feel and that their concerns and feelings are valid.</td>
</tr>
<tr>
<td>Show warmth and support</td>
<td>Smile, where appropriate. Look concerned. Avoid being cold or abrupt.</td>
</tr>
<tr>
<td>Admit it when you’re lost</td>
<td>Avoid pretending to understand. Simply say something such as: ‘Sorry, could you just say that again?’ Clarify anything you don’t understand. This lets the other know that you have been listening and that you understand what they’re saying.</td>
</tr>
</tbody>
</table>

**Questioning skills**

You use different types of questions for different reasons. Check your understanding of the following question types. You’ll then get to practise these skills to determine a range of client requirements.

You’ve had your first conversation with a client. You thought at the time that the request was straightforward. However, as you were thinking about it later, you had lots of questions you had to ask yourself as well as the client. Below are some questioning techniques that may throw light on client requests.

**Open-ended and closed questions**

Examples of open-ended questions are

- What kinds of products are you interested in purchasing?
- What do you need the equipment for?
Examples of closed questions are

- Are you saying that your email system is not working?
- Are you sure that you’re happy for your repayment levels to fluctuate?

Open-ended questions gather more information. Someone answering an open-ended question cannot answer with a ‘yes’ or ‘no’, because it wouldn’t make sense. Closed questions do require a ‘yes’ or ‘no’, or a similar response. These are used to clarify what you’ve received or to seek confirmation of the idea that you have.

Think

Think of some open and closed questions that you may need to ask your own clients. If you are currently not in a workplace situation, think of some everyday examples where these would be applicable.

What-if questions

Sometimes your client may come to you for expert advice because they cannot decide between options—and they need you to help them make an informed choice. You can help them decide by asking hypothetical questions. You’ll also be able to explore the possibilities with the client (or on your own). You’ll also be able to bring out any reservations that you or the client may have.

Here are some examples of what-if type questions.

- If I choose this option, what would the risks be?
- If I choose a second option, would I face the same risks?
- Would I be more comfortable with a low risk and low return option?

Sorting and sifting questions

Sometimes a client might give you a lot of information. These are usually clients who do not really know what they want, are verbose, do not get to the point or talk in a stream-of-consciousness manner.

Some of this might not be relevant to their request and you would need to sift through the information.

Another example of when you’d need to ask yourself sorting and sifting questions is when you’re faced with lots of information when carrying out research (say, research that will enable you to inform the client of their options).
Here are some examples of sorting and sifting questions.

- Is this bit of information really relevant to solving the client’s problem?
- Is this information from a reliable source?

**Clarification questions**

Sometimes your client may give you a whole lot of facts that do not make sense. You may think, for instance, that some of the information is relevant. Sometimes opinions may not seem logical or coherent. Information may seem contradictory. Before you dismiss that information as useless, ask for clarification. Perhaps the client had not explained in great detail because they had assumed that you had the prior knowledge to understand what they were saying.

Here are some examples of clarification questions.

- How did you arrive at that conclusion?
- How does your conclusion follow from the facts you outlined?
- What do you mean by friendly ambience?
- Exactly what will be the main purpose of the computer?

**Planning questions**

Sometimes your client will need your help to plan ahead. A property loans officer, for example, might help clients choose a loan type that suits them over the long term. You would also need to ask yourself planning questions when prioritising requests either from one client or a number of them.

Here are some examples of planning questions.

- Which problem of the clients’ should I attend to first?
- Do you want to pay off your loan sooner?
- Can you think of other situations when you’d ask planning questions of yourself or your client?

**Strategic questions**

As you go about the process of determining and analysing your client’s requirements, you need to be constantly asking yourself or your client strategic questions.

Here are some examples of strategic questions.

- Have you thought about how we could approach that problem?
• Should I research that area further before I make a recommendation to the client?
• How best do we proceed from here?

Organising questions

These allow you to structure your information. Without a structure, the information would just be bits and pieces without any discernable patterns. With a good structure, we’ll be able to: see trends or themes; see how one bit of information fits in with others; compare and contrast.

• Which three areas are you most interested in the two of us exploring?
• Now take a look at each of these areas
• What plans do you have for each of these areas?
• Now take a look at each plan; would you have an idea at this stage of how we can achieve the plan?

Probing questions

Probing questions go deep into the issue or problem. They aim to dig out insights and uncover underlying causes.

Here are some examples of probing questions.

• Exactly what accounting tasks do you find difficult to perform manually?
• Why do you find these difficult?
• What are these tasks (give details of each)?
• How long does it take you to perform each task?

Divergent questions

A client may come to you with a problem. Both of you may already know about the advantages involved in a certain way of doing things. Now you can both explore the risks. Once you are familiar with a certain area, you can use divergent questions to help you explore territory that is related to what you already know.

Here is an example of the divergent technique.

• We have now arrived at a list of things that you need to do while in Paris. Now let’s look at the things that you should not do.
Devil’s advocate questions

A client may decide that they want a certain type of equipment. Everyone is using that type of equipment. However, you want to make sure that that’s what they really need. What they want and what they actually need may be different.

Provocative questions help you eliminate myths, fallacious arguments, hype and the like. They help you arrive at facts or the ‘truth’.

Here are some examples of provocative questions.

- I know that this is the latest model on the market and that everyone in your school says that you need to purchase it. However, do you really think it’s what you need?
- Will it be appropriate for the weather conditions in your country?
- Has anyone ever researched the problem?
- What evidence do they have?

Try it

Practise your questioning skills by completing at least one of the questions below.

Suppose you work for a computer store. Jan, a high school student, needs help in buying a computer. He doesn’t know much about computers. List five to ten questions you would ask to try and find out exactly what he needs.

Suppose you work for an information technology help desk. What are typical questions you would ask to find out what your clients’ requirements are?

Identify a typical client request you deal with as part of your work. Prepare a checklist of questions that would serve as a prompt when talking with clients to determine their requirements.

Feedback to activity

You might ask questions such as:

What are you going to use the computer for? We need to work out what the minimum requirements are. Do you just want to use a Windows version of a word processing program? Do you need to be able to use the Internet? Do you want to play multimedia virtual reality games?
How much money have you set aside for this purchase? Do you want to buy as much as you can afford? I suggest you buy a good main system unit (ie monitor, processor, disk space and memory). Shall I explain what I mean by a good system unit?

How much expansion are you planning for the future? What configuration are you interested in (eg desktop, mini tower or tower). The towers tend to have capacity for more expansions and have larger power supplies than the desktop ones. Are you planning to purchase additional components such as tape drives?

As a computer salesperson, you might even go a step further and devise a list of questions that you’ll need to answer for the client. These questions might include:

- What brand of processor does the computer have? What is its type and speed?
- What brand and type of hard drive does the computer have?
- What brand and speed of CD-ROM drive does the computer have?
- Can I upgrade the computer’s memory at a later date? How is this done? How much upgrade can be installed?
- What type of monitor does the computer come with?
- Does the system come with a tape drive? What brand, type and capacity is it?
- Does the computer come with software? Which ones?

2. If you work for a help desk, some questions you could ask are:

Are there any tasks that you were able to complete that are no longer possible to do? Explain.

Are there any tasks that you would like to be able to do but cannot? Explain.

Are there tasks that take too long to complete? Explain.

Are there any chronic or persistent equipment failures? Explain.

3. There is no suggested Feedback for this question. However, as you can see from the Feedback given for the previous two situations, it’s useful to come up with a checklist of questions to help you focus on the issue.

Summary

Exactly what does your client want from you?

In this topic, you learnt the skills that will help you accurately determine and analyse client requirements. You learnt skills such as how to document,
in a systematic manner, information provided by clients. You learnt to devise, in consultation with clients, specifications for a job. You also learnt to use active listening skills that would enable your client to speak freely about their requirements. You also learnt how to ask questions that would help you elicit the information you need from clients—for example, questions that clarify, probe and help you to organise, sort and sift information.