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ANALYSING AND IMPROVING A RECRUITMENT PROCESS: A TEACHING CASE FOR DEVELOPING BUSINESS PROCESS IMPROVEMENT CAPABILITIES

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Abstract

The demand for Business Process Management (BPM) is rapidly rising and with that, the need for capable BPM professionals is also rising. Yet, only a very few structured BPM training/ education programs are available, across universities and professional trainers globally. The 'lack of appropriate teaching resources' has been identified as a critical issue for BPM educators in prior studies. Case-based teaching can be an effective means of educating future BPM professionals. A main reason is that cases create an authentic learning environment where the complexities and challenges of the 'real world' can be presented in a narrative enabling the students to develop crucial skills such as problem solving, analysis and creativity-within-constraints, and to apply the tools and techniques within a richer and real (or proxy to real) context. However, so far well documented BPM teaching cases are scarce. This article aims to contribute to address this gap by providing a comprehensive teaching case and teaching notes that facilitates the education of selected process improvement phases, namely identification, modelling, analysis, and improvement. The article is divided into three main parts: (i) Introductory teaching notes, (ii) The case narrative, and (iii) Student activities from the case and teaching notes.

Keywords: Business Process, Process Analysis, Process Improvement, Case-based teaching, Recruitment Process

1 INTRODUCTORY TEACHING NOTES

Using case studies is an effective mechanism for bringing the “real world” experience into the classroom (Richardson et al. 1995). The case method plays an increasing contribution to the learning process with its “active” or “participative” learning style, which is much more effective than the traditional “passive” counterpart (cf. the mere lecture approach) (Ó Cinnéide 1998). We recommend using this case study in a mixed approach where the core theoretical elements are taught in a lecture and simultaneously (as each topic is covered) the case is used to apply the theory (typically in groups, within workshop settings).

We believe that the basics of BPM can be taught to any cohort that has a basic understanding of how a company functions. Thus, this case study is appropriate for both undergraduate and postgraduate students as well as for training professionals in practice.

The case study presented here is of a recruitment process. The narrative provided (see Section 2) is based on a real process of a company based in Brisbane, Australia, which has been anonymised to protect the confidentiality with the company and some data/ process steps have been changed (and at times fabricated) to describe a more dramatic ‘as-is’ process to make the case more interesting and to also enable the students to better apply the analytical tools and techniques taught. The recruitment case is of an outsourced recruitment firm that provides recruitment services to the Australian public sector. The process described here is scoped from the actual preparation of the appointment to the appointment notification stages and is specifically focused on the process related to permanent positions.

The case is designed as a ‘running-case’ that can be used in a BPM specific subject/ course that focuses on teaching business process improvements using a staged approach. The focus here is on improvement efforts specifically targeting a particular process. A process improvement lifecycle approach is recommended as the methodological framework of teaching here, which also defines the learning objectives and flow of the related teaching. The process improvement lifecycle presented by Rosemann (2004) is suggested [see (Rosemann 2004) for further details about each phase]. As Figure 1 depicts, the specific scope of the learning objectives related to this case study is centred around the lifecycle phases of: modelling, analysis, and improvement, with the identification and implementation phases also (thinly – as indicated by the greyed rows in Table 1) covered to provide better context of the approach. Table 1 provides a summary of the learning objectives, recommended topics to be covered and useful resources. The last column of Table 1 shows how the activities set for the students (see Section 3) align with the overall objectives and set resources.

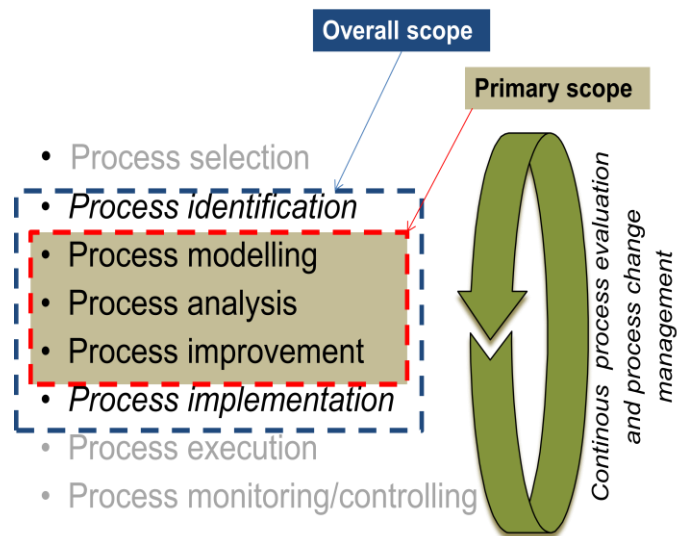


Figure 1. The selected scope based on the lifecycle adopted from Rosemann (2004).

It is assumed that before the case study is used, that the students will be provided a basic introduction to what Business Process Management is and why people consider a lifecycle approach to documenting the approach for conducting BPM projects. It is assumed that the ‘Recommended topics’ as presented in this table will be taught to the students (via face to face/ online lectures and readings)

Learning objectives and Rationale	Recommended topics to be covered	Useful
<ul style="list-style-type: none"> • Understand the process and its related context. • Understand the process improvement lifecycle. 	<ul style="list-style-type: none"> • Process scope, goals, key stakeholders involved and their impact. 	<ul style="list-style-type: none"> • Case study narrative • Readings about Rosemann (2004)]
<ul style="list-style-type: none"> • Understand what is entailed with the Process identification phase. • Learn about how to scope and describe a process. This is an important pre-requisite in order to start analysing the process. 	<ul style="list-style-type: none"> • How processes are identified and selected for improvement using; (i) a case by case approach, (ii) Reference models and (iii) Organisational Process Architectures. • How to get a basic understanding of the process. This can commence with deriving an abstract view of the process using SIPOC and IGEO diagrams. A preliminary status of the process can be done with a SWOT analysis. 	<ul style="list-style-type: none"> • Links to the frameworks like A • Readings about Chain, Process models like SCOR. • Readings about SI SWOT Analysis
<ul style="list-style-type: none"> • Understand the fundamentals of process modelling. • Be able to model (complex) business processes using contemporary modelling techniques and tools. 	<ul style="list-style-type: none"> • A contemporary introduction to the methods, notations, grammars and tools of process modelling. • Detailed guidelines on the most popular process modelling grammars (i.e. BPMN, EPCs) and tools that support them. • How to derive modelling guidelines. • How to conduct structured de-composition of complex processes (with value chains and multi-level process modelling). • How to model from different viewpoints. • Sample examples on how process modelling is used in practice. 	<ul style="list-style-type: none"> • Readings that provide conceptual and formal modelling • Resources on BPM • Resources that provide functionality of modelling tools • Readings about value process hierarchies • Sample modelling • Sample process models
<ul style="list-style-type: none"> • Understand the goals and tasks of the Process Analysis phase. In particular be able to conduct a detailed performance analysis (understand and justify <i>what is happening currently</i>) of the process in scope. 	<ul style="list-style-type: none"> • Overview of the goals and tasks of process analysis. • Details on how to conduct a <i>preliminary analysis</i> of the context in which the process resides in. This includes a variety of aspects such as the analysis of the business environment and cultural context, current transaction flow and capacity, process variations, business rules and process controls etc. • Details on how to conduct a detailed analysis of the current performance of the process based on aspects such as time, cost and quality. • Details on how to identify key performance indicators (KPI) and other performance metrics. • Tasks and skills to support the analysis work (i.e. document analysis, interview conduct, observations, research and facilitation). • Details on how to carry out qualitative and 	<ul style="list-style-type: none"> • Readings to support such as stakeholder interaction analysis, adding tasks, lean pareto analysis, preliminary analysis of the process resides • Readings to support such as cycle time bottleneck analysis that supports the process' performance • Readings to support issues consolidation as fish bone diagram analysis etc. • Resources about ot

¹ Related readings are listed here at an abstract level. This is due to two reasons; (i) the space constraints of listing all related readings here and (ii) to enable the user to use the most up-to-date resources related to the suggested topic. Most topics have a plethora of reading resources readily available.

² See Section 3. This is a summary index of the set of questions and tasks presented in Section 3.

³ The Process Classification Framework (PCF) is an open Standard and is administered by APQC. See (<http://www.apqc.org/knowledge-base/documents/apqc-process-classification-framework-pcf-cross-industry-pdf-version-400>, last accessed, March 3rd 2012) further details.

	quantitative analysis techniques.	
<ul style="list-style-type: none"> Understand the goals and tasks of the Process Improvement phase. In particular how to derive options for improvement, that has true impact, and make improvement suggestions that suit the process goals and contexts. 	<ul style="list-style-type: none"> Overview of the goals and tasks of process improvement. How to derive improvement options through (i) looking internally at the process, (ii) utilising existing resources to its best capacity, (iii) deriving ideas by observing others and (iv) developing process-creativity. 	<ul style="list-style-type: none"> Readings on process model based improvement reference models and Readings about analysis on how resources available process improvement
<ul style="list-style-type: none"> Understand what is entailed with the Implementation Phase, especially the steps to prepare the process and its stakeholders to move towards the improved version. Understand how to integrate change management, communication and project management into the implementation phase. 	<ul style="list-style-type: none"> Overview of the goals and tasks of process implementation. Means of operationalising the ‘to-be’ process (process, systems, people and procedural changes). Change management (including communication strategies) and project management guidelines to progress with the new process. Plans for short term and long term implementation. 	<ul style="list-style-type: none"> Readings about management (in strategies) and process change effects Sample case studies challenges (and measures) the implementation

Table 1. A summary of learning objectives, teaching topics, useful resources and student activities set within the framework of process improvement lifecycle depicted in Figure 1.

in a progressive manner, and that the related case based tasks are then conducted as a means to apply the theory delivered, as each topic is unfolded. We recommend that students work in teams and see themselves as ‘real’ consultants, and hence we expect a professional standard in the outcomes created. We encourage you to embed formative feedback loops to assess the student’s learning as each main phase of the lifecycle is completed. For this, we ask the student teams to maintain their work in a portfolio and be prepared for impromptu presentations in class. If the design of the course permits, we also recommend that the students provide a detailed report of the Analysis phase and another at the end that illustrates possible process improvements and implementation options.

Case based learning is most effective when the students experience “participative learning” (Ó Cinnéide 1998). For this the students must be motivated from being “passive” customers in our class room to being “participative” in terms of discussion, decision making, creativity, etc. In other words the application of the case should be an “enjoyable” aspect for the students. A number of strategies such as ‘meet-the-experts’ sessions, ‘in-their-shoes’ role plays, impromptu in-class presentations, competitions and extra challenges etc are suggested, which are not discussed here⁴ due to space and scope constraints, but have proved to be effective in their prior applications.

Extra materials, including further evidence about the case study (i.e. related statistics about the process, sample forms etc), model answers to discussion questions (see Section 3), a comprehensive instructor-support-pack that includes, a slide pack to introduce the case study, a glossary of terms to distribute to the students in the class and a list of additional references are available upon request⁵ from the first author.

2 THE CASE NARRATIVE

This section provides the narrative of our teaching case on a recruitment process of an outsourced recruitment firm, named ‘Talent Seek (TS)’. It is written as a ‘call for help’ from the audience and is

⁴ We have tested these in our class rooms using this very case study, and are willing to share our experiences and insights. Please contact the principal author for further details if interested.

⁵ Please note that we expect you to provide evidence when you contact us that you are a BPM educator/ instructor before we can release teaching notes to you. This is to make sure that potential students and/ or trainees do not get access to the material, which will hinder the planned case based learning experience.

designed to cover the overall scope of the process improvement lifecycle depicted in Figure 1. This is appropriate both for university teaching in the context of BPM curriculum and for professional training on knowledge and skill advancement in BPM. It is recommended that this narrative portion (from section 2.1 – 2.4) is extracted as a separate resource that will handed to the students to work on, when used in the class room⁶.

2.1 Preface

It is Monday morning (March 5th 2011) – a beautiful sunny day in Brisbane. Jenny Deakin stares at the meeting minutes from last Friday’s meeting, and sighs with anxiety. All senior staff from Talent Seek was gathered to be addressed by the CEO Joe Barns who was quite upset after the annual service review. *“How come we are the last to know about some openings”, “Why is it that we take too much time to process the applications”, “No wonder the better candidates don’t wait to hear back from us!”*, *“I want to see different ... oh yes MUCH different results by the next review – Let’s hope we still exist by then!!!”* etc. were some words that have been echoing in Jenny’s mind throughout the whole weekend.

Jenny is the new Manager of the Business Analysis & Improvement team at Talent Seek, and has 6 Business Analysts (BA) working under her, all who have been at Talent Seek for years. She has been there for only 3 weeks and has felt that the other Business Analysts often show a cold shoulder to her ... Jenny is passionate about processes, but has difficulty to get her Business Analysts colleagues to see the value of ‘process’ thinking. After one of her debriefs last Monday - she overheard at the lunch room one BA saying to the other *“What is it with ‘Process-Jenny <giggles>?! ’...*

Just half an hour from now, Jenny has a second meeting with the senior management at Talent Seek, and knows that she will be asked to initiate and manage some “serious improvement initiatives”. She will need talented process thinkers who can help her with this, and knows that her current team does not have the capabilities, skills and passion she needs for this to work. Jenny picks up the phone and rings a BPM consultancy service provider to see if she can suggest some ways of getting some fresh talent and to support her with this endeavour.

2.2 Background

Talent Seek is an organisation with 500 employees that offers human resource services to both Federal and State Government in Australia. It has a nationwide customer and client service focus, working in partnership with its clients (state-wide public sector agencies and federal government departments of Australia), to attract and retain a skilled and adaptable workforce able to deliver quality services to the people of Australia. TS provides operational advice, support and coordination of recruitment services. Their services include: Coordinating recruitment advertising and vacancy processing; processing pre employment checks (e.g. criminal records, employment history), producing appointment letters, coordinating job evaluations, and coordinating and supporting various traineeship, graduate and recruitment programs for Australian government. *“Our clients are our primary focus – we strive for operational excellence”*, is the motto CEO, Joe Barns, desires to live up to.

The core service of TS is the recruitment of public service members, and such recruitment can be for a range of different types of employment; ranging from casual, permanent, contract-based, to secondment positions. In the TS service 80% of the cases are for permanent positions, and hence the primary focus for process improvement will be around the recruitment of permanent positions. It has also been agreed that the focus will be on the main recruitment stages and thus other related tasks such as staff probation and pre employment checks etc will be looked into in later initiatives.

⁶ A professionally formatted case narrative is available from the principal author upon request. We have converted here to fit the PACIS 2012 submission template.

Your consulting team [of 4-5 team members] has been asked to investigate this process, analyse the current issues and provide a set of well-argued proposals to Jenny for the short and long-term future of the process. Jenny sees that the process needs to be faster, more structured and transparent. Talent Seek *should be* the first place that talented candidates turn to when looking for new work in the Australian Public Sector and certainly where government agencies will come to when recruiting for new talent. In its current status, applicants are extremely unhappy with the long time taken to hear back from Talent seek (and at times not even hearing at all) and have lodged many official complaints. The clients are also voicing that they are losing good candidates due to the inefficiencies of the process.

2.3 The Process

The recruitment process revolves around: preparation, actual recruitment and selection, and appointment. It is mostly driven by the Recruitment Managers at Talent Seek. Even though there are comprehensive process instructions in place at TS – which are derived by the Senior Recruitment Manager (appointed as CLA 8 and paid A\$110,000.00 per annum) responsible and accountable for the recruitment process, these are often not up-to-date, nor consistently followed by the Recruitment Managers. There are 6 different Recruitment Managers (all appointed at CLA 6 and paid A\$89,000.00 per annum), each looking after different areas (such as Health, IT, Admin, Management, Policy and Law). They each have a team of TS Recruitment Coordinators (appointed at CLA 5 and paid A\$62,000 per annum) who provide management support to the Recruitment Management role.

Fast processing time (time to fill) and high client satisfaction are the primary goals set for this process (although this may change for different stakeholders' interests). The union/s in particular has/have a vested interest on the recruitment process, and has/have a range of policies and procedures sent to TS to review and consider. There are key performance indicators (KPIs) in place, which are not measured until the position has been filled. Thus it results in such issues that if there is a delay in processing, it will be too late to remedy it (as the KPIs are lagging indicators).

Large private companies are often quick to attract the best candidates. The approach taken by TS is to conduct a thorough pre-screening of the candidates through well-defined selection criteria so that it rarely conducts two interviews with the same candidate for a certain position. Candidates applying for a job via TS meet higher demands during the application stage, as they are required to meet the extensive selection criteria using a paper form asking for written details for each criteria. As a result, it is only natural that customers expect quick feedback. However, giving feedback to the candidate (and any other liaising recruitment agency) is not a priority for TS. Usually, the market quickly screens candidates for a first interview, followed by two or three further interviews. This delay in communication can cause frustration for the candidates and result in the loss of good candidates to the market. Sometimes certain positions are advertised when the client-end manager already has an employee or contractor in mind. This has negative implications as TS (or its subcontracted/partner agencies) proceeds with the advertising (and may not be paid for this), and good external candidates spend considerable time filling out selection criteria – where sometimes, the process ends with no feedback (other than a rejection letter), which can potentially generate frustration and put off good candidates from re-applying for future opportunities. In addition, there are also internal costs to conduct the process which could be avoided. Sometimes there is also a conflict of interest – for example when priorities are given to existing employees within government agencies, yet the process takes place for policy and procedure compliance.

TS processes on average 18,000-26,000 applications (for an average of 300 positions) per month. The process starts with *recruitment preparation* – triggered when the TS Recruitment Managers identify a position. This can happen either by the client-end manager(s) informing the TS Recruitment Managers of a potential position, the recruitment manager actively seeking out for potential vacancies (which is currently done in a very ad-hoc manner), or at times by word-of-mouth. How often the different identifications occur is unknown to Jenny.

If an existing position is vacant (or known to becoming vacant) the TS Recruitment Managers confirm with client side management that it is vacant (or known to becoming vacant) – sometimes via email and sometimes via telephone correspondence, whatever seems handy at the time, and move on to updating the position profile. TS Recruitment Managers review the existing position profile (in conjunction with an HR representative and client-end next level management), to confirm validity of the position profile prior to commencing any recruitment. In instances where there are inconsistencies between the profile and actual role (which is an observed scenario for 60% of the vacant positions), the TS Recruitment Managers pass the position profile to the client-end manager to take action and address this. Some managers will have their next level managers review the profile as well. TS does not provide any facilitation for this, and on average it takes 5-10 working days before the position description is finalised and re-sent (via email) to TS. Sometimes the TS Recruitment Manager needs to follow-up with the client-end management for the revised position profile.

If a demand for a role exists, but no current position exists, then the Recruitment Managers consult with the next level manager or client HR representative/managers to determine whether a new position should be created and if a Business Case should be developed. The amount of new position openings varies based on contextual factors such as restructures and mergers – which can reach a peak after elections and with major government initiatives that takes place time to time. On average, this is 10-15% of the positions handled by TS per year. If a new position profile is required (or significant changes are needed to an existing profile), then the manager will be required to complete and create or change the Position Form and go through proper approval. TS Recruitment Managers facilitates this together with the support of the client's HR representative.

The Terms and Conditions are reviewed and determined for all positions by the Recruitment Managers. This has to be approved by the client-end manager and at times (for senior positions CLA 5 and upwards) also by the next level manager. Again it takes time (on average 5-8 days) to get this approval back to TS. The Terms and Conditions derivation includes determining the salary range for the position, and if certain allowances/extras such as flexibility with 9/10 fortnight roster, relocation allowances, motor vehicle provision etc will be offered. It also includes determining the probation period for the new candidate and if any other allowances are applicable. TS Recruitment Managers at this point, will also assemble a selection panel [that will comprise of 3-4 Subject Matter Experts (SMEs) from the client end, next level management or representatives, and HR personnel], and confirm availability of the recruitment panel. The panel should have appropriate knowledge on the subject area, training in interviewing and/or experience in behaviour interviewing techniques.

Assembling the panel, at times, is a logistical challenge (e.g. when finding common times for all panellists to meet, when recruiting for and from regional areas). TS Recruitment Managers will complete all the required documentation (including the development of a Business case and related paperwork for new positions) upon the determination of Terms and Conditions. They also will submit the business case to the client's HR management team for approval, upon which the staff requisition is ready for the actual *recruitment and selection phase* to begin.

Once the staff requisition is approved, the vacancy is set up in a localised system called GovSource (which TS and its clients have access to) by TS Recruitment Coordinator, just as s/he gets ready to advertise the position. GovSource is an in-house HR management system developed in the late 1990's in-collaboration with TS' previous IT department (which has since been outsourced) and the former shared service provider for ICT solutions at Queensland Government - Corporate Systems Agency (CSA) – which ceased to exist by 2001. A number of complaints have been made regarding GovSource over the years, in particular the difficulty to access the system from outside the corporate intranet (which is an issue for external candidate interactions and regionally based work) and the many

outdated records⁷ that are still maintained in the system, months after the vacancy has been filled. ‘A “cloud based” recruitment solution comprising permission based features including enhanced reporting, assessment, search, and security that support and help manage end-to-end recruitment’ was recommended by Ravi Sharma – the CIO of TS’ outsourced ICT partner last year, but this was not considered further due to budgetary constraints.

The TS Recruitment Coordinator creates and publishes the advertisement. The advertisement has to be approved by the next level manager (from the client end) prior to publishing. If applicable, depending on the nature of the position, other sub contracted recruitment agencies are notified. These external recruitment agencies are engaged according to prior agreed SLAs. Once the agencies are notified, they are granted access to the specified job on GovSource. About 15% of the positions handled by TS are filled by candidates found via external recruitment agencies. Though the positions are advertised by TS, they can also be advertised by the clients HR Services but direct all applications to TS. The TS Recruitment Manager then waits to receive the applications.

Applications may arrive in normal mail (~50%), by email (~30%), at times (~10%) directly through the GovSource system (this is mainly internal candidates who are already Australian public sector servants), and through the agencies at other times. Once applications close, the TS Recruitment Coordinator and their teams⁸, will package the applications and appropriate documentation and forward them to the Recruitment Manager. All printed applications are checked for completeness. Digital copies that arrive are also printed and checked for completeness. The admin and clerical staff, check the applications against a set check list. If any information/ details deemed relevant is missing the candidate is not contacted for clarification, instead the application is discarded, and no information about the application is retained.

Applications from the recruitment agencies are also collected at this point – the recruitment agency conducts the completeness check and sends the original applications (after retaining a copy themselves) to the TS Recruitment Coordinator. All printed applications are photocopied to make multiple copies for the recruitment panel members and Recruitment Manager. A copy is also archived in the TS HR Archives room (these applications are checked and cleared from the archives every 3 months by the TS clerical staff). The applications and their bundles are then couriered (if not in same location) or hand delivered (if in same location) to the Recruitment Manager. The applications are processed and ready to be sent out to the Recruitment Manager in approximately 5-8 working days from the application close date. Upon receiving the applications, the Recruitment Manager distributes the applications to the recruitment panel, and requests that they go through the applications in detail prior to a face-to-face meeting, which is targeted to take place normally after giving at least a fortnight’s time for the panellist to review the applications.

A very comprehensive evaluation sheet is provided for each panellist (mainly the SMEs at this stage), asking them to each independently rank all the applications against the selection criteria. These evaluation sheets are emailed to the panellists by the Recruitment Manager. Upon the receipt of the filled evaluation sheets [which normally takes longer than the set time (on average at least 3 weeks) and requires constant follow-up] the Recruitment Manager consolidates these rankings, distributes the consolidated ranking sheet(s) and sets a time with the panel to select the candidates to be short listed in Round 1. At this panel meeting session, the top 20 or 20% of the candidates (based on whichever is the smaller number) are looked at in detail. The panellists are also able to discuss any discrepancies

⁷ A recent report run on the 27th of Dec 2011 indicated that there were 1600 records (amongst a total of 15,000 live records) at that time, which were out dated and had to be archived. GovSource was last evaluated in April 2005.

⁸ Usually one team is formed to handle the applications for each position. This team will comprise 2 admin staff at CLA 4 (with a remuneration of A\$56,000 per annum), and an assistant clerical staff, often on a 60% fractional appointment basis – at CLA 2 (with a remuneration of A\$33,000 per annum) supervised by the TS Recruitment Coordinator. Each admin and clerical staff member works in 2-3 teams at any given time.

(major differences) with their original rankings. The Recruitment Manager facilitates these discussions together with a client HR representative.

Upon the completion of the Round 1 selection, the Recruitment Manager commences the reference checking for the short listed candidates. A casual admin assistant (who comes in 3 days a week and is hired at CLA 3 and paid A\$42,000.00 per annum) works to collect the referee reports for all the short listed applicants (this consumes 60% of her workload). The referee checks for the applicants that came through the recruitment agencies are often collected and sent through by the recruitment agency staff. There is a structured form that is sent to all referees to fill in. About 40% of the referee reports do not adhere to this form (or is incomplete) and is sent through again for completing/ correcting. Each candidate is required to have at least 2 correctly completed referee reports. If a referee report does not arrive on time the application is not processed any further. About 10% of the referee reports do not arrive on time, often due to inaccurate contact information provided or the referees merely not sending them back on time. The related applications are halted from been processed any further due to incomplete or untimely referee reports. They are sent to be archived together with the rest of the archived applications.

The consolidated referee reports are sent out (by the Recruitment Manager) to the panel members to evaluate and rank the candidates further in light of the referee reports and in preparation of the next short listing of the candidates (for Round 2). A comprehensive evaluation sheet is provided (different to the evaluation sheet used in Round 1) to rank the applicants further based on the referees' input. A face-to-face meeting is set up again (about a fortnight after the referee reports are sent out), where a process similar to that used in Round 1 is followed.

It has been noted that the Recruitment Manager is often contacted by the panellists (~ 1 in 5 panellists) prior to Round 2 meetings and evaluations, requesting for a copy of the applications again as they have misplaced the set (or parts of them) that were sent earlier. The casual admin assistant makes the relevant copies again and sends it through then. The Recruitment Manager is also often contacted prior to Round 1 and 2 meetings with queries (and complaints) about the evaluation sheets the panellists have been asked to fill in. Some even question the need to fill all this information and ask if the mere discussions at the meetings are not enough - this is however the 'protocol' used and is required due to the documentation evidence that has to be maintained for auditing requirements.

The top 5-8 candidates are selected at the Round 2 panel meeting, and the Recruitment Manager starts the planning for the Interviews (Round 3 selection) with a preliminary interview schedule. Interview locations will be based on applicant locations to reduce travel wherever possible. Applicants who are required to travel long distances will be assessed individually for reimbursement of travel costs in accordance with travel policy, although most applicants will be required to travel at their own expenses. All the logistics for the interviews are arranged by the Recruitment Manager and the casual admin assistant (~ 20% of her time is spent on this). The Interview Panels use a structured interview template with questions and answer marking sheets (that adheres to HR policy and Union requirements). For some positions, it may be desirable to have the applicants undergo a psychometric test, which is determined by the Recruitment Manager and conducted by trained HR specialists. In 80% of the cases the candidate is selected from this Round (Round 3). However, the need for a second interview round (Round 4) is a possible outcome from this Round, and if this is the case, the Recruitment Manager (and his/ her team) makes the relevant arrangements. Once the preferred candidate is identified, the Recruitment Manager is ready to recommend and obtain approvals to appoint the successful candidate.

After the identification of the preferred candidate, the Recruitment Manager starts to advise all other candidates verbally that their application has been unsuccessful, and proceeds to decide the terms and conditions of the offer to the selected candidate. This includes the salary arrangements, roster and flexible working arrangements etc. If relocation applies - the relocation terms and conditions to be offered is determined. If a familiarisation visit is applicable, then the Recruitment Manager liaises with the manager and their HR Advisor to organise this. If a provision of a motor vehicle is applicable for

the position, then this is arranged in accordance to the 'Motor Vehicle Use Guidelines'. If probation applies, the appropriate period is also determined in liaison with the manager and HR Advisor. All other allowances applicable to the appointment are also reviewed and confirmed at this time.

If required, the Recruitment Manager discusses certain aspects of the position with the preferred candidate ensuring that such discussions are *not* perceived by the candidate to be a formal offer of employment. Formal offers can only be made by the relevant manager verbally or in writing once approval has been obtained from HR Services and relevant approving manager. It is also Australian Public Sector Policy to check if the preferred candidate has previously received a Voluntary Redundancy from any Australian Government institute. In such cases, a separate process is triggered to investigate the details of the redundancy package and information disclosed to the client manager and HR representative. Any recommendation to appoint must be agreed with the client's HR Services and Manager prior to any offer of appointment to the preferred candidate.

The Recruitment Manager then raises and sends the Appointment Approval form to the next level manager. The Manager contacts the Recruitment Manager or HR Services (via phone or email), for explanation of any items contained on the Appointment Approval form. It is government policy that the Appointment Approval form must be approved by an existing employee (of the client). When the manager is an external resource (such as a contractor or consultant), s/he is not permitted to authorise the appointment. The manager must then arrange for their next level manager who is a permanent employee to approve the form. Upon the receipt of the Appointment Approval, the Recruitment Manager checks and sends this to clients' HR Services, with other mandatory documentation which includes: Shortlisting information, all Interview notes, two reference checks and the signed Chairperson Checklist. All documentation must be received by HR Services prior to any formal written letters of offer being sent out to the prospective appointee. A copy of the completed form is scanned and recorded against the position in the GovSource system. In some cases, where there are variations with the appointment to standard Australian Government policy regarding appointments, a Business Case must be completed and attached to the Appointment Approval (also stored within the GovSource system).

The TS Recruitment Coordinator also arranges for a medical assessment (if applicable). This triggers a separate sub process; "Preferred Candidate's medical assessments" (which can take up to 21 days to arrange and complete – but which takes place only 12% of the time). If the medical assessment is not satisfactory, then the candidates next-in-line (from selection Rounds 4, 3 or 2) are contacted in order of priority (based on prior ratings). Very often the shortlisted candidates have already been recruited elsewhere and the process has to re-commence (again) with a new advertisement.

If the medical assessment report is ok, then the TS Recruitment Coordinator informs the Recruitment Manager, whom then liaises with the HR Representative to determine when the offer can be made to the candidate. Upon the receipt of confirmed information, the Recruitment Manager makes a formal verbal offer to the preferred candidate and notifies his/ her team and the client HR Services of the outcome.

If the candidate accepts the offer the HR Representative makes a formal written offer to the candidate. A Commencement Pack containing the necessary Payroll forms will accompany the Letter of Appointment. The Commencement Pack will include: Letter of Appointment (and duplicate), Copy of Position Profile, Personal Details Form, Payroll Deductions Form, Authority to Bank Form, Superannuation Contribution Election Form, Use of Systems Agreement Form, Australian Taxation Office (ATO) Tax File Declaration/Withholding Form, Census of Australian Public Sector Employee Form, (Clients') Code of Conduct (if applicable), Electricity Account Salary Sacrifice Option and Declaration of Interests Form, Social Club Application Form(s). The following additional forms may also be included, where appropriate, Relocation Terms and Conditions Guidelines, Claim for Relocation Expenses, Declaration of Car Travel.

In some cases (40% of the time), the candidate renegotiates terms and conditions prior to acceptance. Renegotiation of employment terms and conditions is considered to be appropriate, where both the

Recruitment Manager and the candidate are willing to reconsider the offer, and where the Recruitment Manager has the authority (granted by the client Manager and/or HR services) to enter into such negotiations. Should renegotiations be considered, the Recruitment Manager should refer to the Renegotiate Appointment Guidelines set by TS for each client and also liaise with the client Manager and HR Services. Should the renegotiations not succeed with the preferred candidate, then another candidate (if applicable) is selected and a medical test is arranged (if/as required). Upon success, a formal verbal offer is made by the Recruitment Manager to the second preferred candidate (who may also negotiate and accept or decline the offer).

Thus, if the successful candidate declines the offer or does not pass the medical examination, the position is either offered to the next candidate(s) or readvertised. When a successful candidate accepts the offer, the vacancy is closed. Once the signed Letter of Appointment and all commencement paperwork has been returned to HR Services by the successful candidate, HR Services will follow the steps required for the employee to commence work – this is not in scope for this project. However, it should be noted that not all forms are filled and submitted in time. Hence, the Manager is encouraged, during early discussions about the position with the candidate, to emphasise the importance of completing and returning all forms that are applicable to their appointment, to HR Services prior to their first day. This enables the new staff member to be able to access their systems, timesheets and correct authorities and to enable them to be paid in the earliest possible pay period. In the event that the appointee leaves the position within 3 months of commencement, the Manager may reconsider candidates from the original pool of applicants, and will contact the TS Recruitment Manager for this.

Finally, TS receives payment from the client organisation each time for placing a qualified candidate into a position vacancy. The fee structure is between 12% and 25% of the annual remuneration of the placed candidate⁹, which is payable when the candidate has signed his/her contract and for the first 6 months since the candidate starts working. For higher level/executive positions, the client organisation will pay an upfront fee (usually 1/3 of the total fee) when signing a contract with TS and will pay the remaining amount when the candidate is placed.

2.4 Challenges

The team of consultants (or your team) are requested to conduct a comprehensive process analysis and improvement project for the Talent Seek's recruitment process given the context above. The main challenges are expected to centre around: development of a detailed understanding of the current (as-is) recruitment process; definition of a (graphical) process model describing the process, and a TS organisational model capturing in particular the data relevant to its recruitment process; identification of key performance indicators, benchmarks, and other performance metrics; conducting quantitative and qualitative analyses of the as-is process performance; and proposal of opportunities and recommendation for process improvements.

For Jenny to be successful (and in consequence for your team to be successful), it will be important to provide Jenny with quantified and qualified benefits of the suggested improvement ideas. Jenny likes to implement some ideas already by the next 3-6 months, but is also very interested on the improvement ideas proposed by your team with a horizon for implementation within the next 12-18 months. If possible, Jenny would like to understand the best implementation strategies to achieve the improvements in an effective and efficient manner.

Note that all TS members are very busy and the team will not be able to gather further information at the moment. In the case that the team believe information is missing for any of planned process analyses, the team will have to make appropriate assumptions.

⁹ The percentage varies depending on the specialised nature of the position, the skill sets required, the anticipated rounds for selection of candidates, expected number of applicants etc.

3 RECOMMENDED STUDENT ACTIVITIES AND TEACHING NOTES

Students are to work in teams of 4-5 members and are expected to come prepared (having attended the relevant lecture and read the readings) for each session. The instructor will provide an outline of the course on which topics are covered when and what tasks are to be completed for each session. Students are expected to maintain a portfolio of the artefacts created within the case discussions and activities. This is to be able to use artefacts across lifecycle phases (at different sessions) and also to build the resources that will be part of the overall Analysis and Improvement Reports.

3.1 What is this case about?

3.1.1 *What are the main goals of this process?*

3.1.2 *What are the main phases of the described process?*

3.1.3 *Who are the key stakeholders in this process?*

3.1.4 *What roles do these different stakeholders play within the process?*

3.1.5 *What areas/aspects of the process are not clear for you – derive a detailed set of questions that you seek to ask at the client side Interview.*

3.2 What reference models and/or process frameworks might you consider to better understand this process?

3.2.1 *Where might you be able to get some benchmark details about this process?*

3.2.2 *What are the pros and cons of using a process frameworks and/ or reference models in defining and understanding an as-is process?*

3.3 Where might this process fit into the overall process portfolio of this organization?

3.3.1 *Is it a 'support' or a 'core' process?*

3.3.2 *What might be the previous processes and what are the interfaces to them?*

3.3.3 *What are the subsequent processes and what are the interfaces to them?*

- 3.4 Create a SIPOC diagram and an IGEO diagram to capture the context of this process.**
- 3.4.1 *What are the advantages and disadvantages of these two approaches?*
- 3.5 Model the current (as-is) scenario for this process.**
- 3.5.1 *Derive a high level value chain that describes this process.*
- 3.5.2 *What modelling tool and technique will you use to model this process? Justify your selection.*
- 3.5.3 *Document the modelling guidelines your team will use for this modelling effort.*
- 3.5.4 *Apply the guidelines and derive a complete 'as-is' process model for this process.*
- 3.5.5 *Reflect how easy or difficult it was to abide by the guidelines you had created – describe your response with some samples from your work.*
- 3.6 Provide a preliminary analysis of the process.**
- 3.6.1 *Derive a SWOT analysis about this process.*
- 3.6.1.1 *What are the strengths and weaknesses of doing a SWOT analysis on the process?*
- 3.6.2 *What the current constraints of the process?*
- 3.6.3 *Derive a stakeholder objective matrix for this process.*
- 3.6.3.1 *How are the objectives of the different stakeholders similar or different?*
- 3.6.3.2 *How can this effect the process improvement initiative?*
- 3.6.4 *What aspects of the process can you do a Pareto analysis on?*
- 3.6.5 *What other techniques can you use here to enhance your preliminary understanding of the process?*
- 3.6.6 *Provide a summary document that articulates your preliminary understanding of the process.*
- 3.7 What are some of the issues of this process?**
- 3.7.1 *Maintain an issues register for this process.*
- 3.7.2 *How might you prioritise these issues?*
- 3.7.3 *Conduct a root cause analysis (making the relevant assumptions as deemed relevant) to 3 of the top priority issues identified by your team.*
- 3.8 Provide a detailed analysis of the process's current performance.**
- 3.8.1 *What techniques might you use here to derive a detailed performance matrix of the current process?*
- 3.8.2 *Conduct and show evidence of at least 5 relevant KPIs (making the relevant assumptions as deemed required for the analysis)*
- 3.9 Provide some short term (within 3-6 months) and long term (within 12-18 months) improvements for this process.**
- 3.9.1 *Discuss your recommendations and how you derived at it.*
- 3.9.1.1 *What approach(es) did you use to generate these improvement options (and why were these approaches chosen)?*
- 3.9.1.2 *What are the constraints that hinder/ influence your recommendations?*
- 3.9.2 *Summarise your recommendations in a detailed business case.*
- 3.10 Develop a detailed implementation plan for your recommendations** (integrate this suggested implementation plan to the business case created above).

References

- Ó Cinnéide, B. (1998). Proposed enhancement of the contribution of the teaching note to the case writing process. *Journal of European Industrial Training*, 22(1), 28-32.
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- Rosemann, M. (2004). *Business Process Lifecycle Management*. White paper. Queensland University of Technology. Brisbane.