

# Case Study



## CHARTERIS

### Charteris plc discovers Octopus.....

#### Introduction



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Charteris is a consultancy that acts as *'the essential bridge between business and technology'*. It helps leading organisations improve performance through business change and the strategic application of the latest proven technologies.

Offering a rare blend of business expertise and technological flair, Charteris provides the essential bridge between business and technology. Their clients are in sectors including Financial Services, Law Firms, Media, Public Sector, Retail, Manufacturing, Services and Telecoms.

Charteris employs 140 people. Consultants typically have over 20 years of professional experience and a proven track record in senior management and consulting roles. They usually work on client sites and few employees are office based.

#### Customer quote

**Barry Hoffman , Head of Human Resources.**

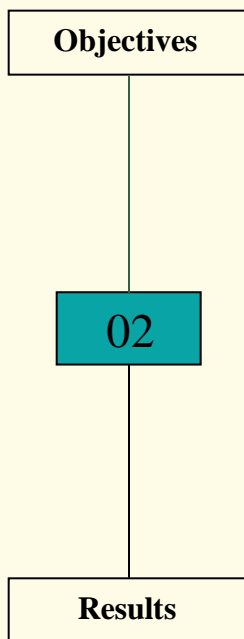
“We needed a solution up and running very quickly and at practically no cost as there had been no budget allocated. Implementation had to be quick and simple - and an easy to use, intuitive solution would avoid devoting time and budget to rollout and training. Self service was essential and security was paramount to maintain confidentiality of information.”

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### Further benefits have been achieved....



Barry Hoffman, chairman of the London branch of the CIPD, joined Charteris as Head of HR in 2005. His goal was to ensure that effective HR management made a clear, positive contribution to the success of the business.

Getting started was met by the obstacle of a lack of HR information – there was no computerised HR system and paper files and spreadsheets held inconsistent and incomplete people based information. Hoffman knew the right starting point was an HR software solution that could act as a central repository for people based information that would form the foundation for him to work from.

Charteris implemented Octopus within a very short time frame. Most of the set up was done at the Octopus offices and only a single implementation day was needed at Charteris for Hoffman and an HR assistant to be taken through how to use it.

Upfront costs were minimal and with low monthly costs the lack of allocated budget proved no obstacle. Employees stay connected by using Octopus self service and due to the technology behind Octopus it is much more secure than traditional on premise HR systems. Good quality HR information, secure and easily accessible has provided the foundation for effective HR management and its contribution to business success.

In addition to the original objectives further benefits of efficiency, motivation and enabling best practise have also been achieved.

### Customer quote

“Octopus stores all essential people based information which can be retrieved instantly on reports and analyses. With Octopus we had a solution that really got HR on track at a cost in the region of £2.50 per employee per month.”

# Case Study



## CHARTERIS

Business information from HR is now quick and easy to produce, saving time and money...

Story



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On joining Charteris, Hoffman’s first challenge was getting quality information together about the people in the business as a starting point for making an impact as Head of HR.

The lack of data from any HR system led to time being wasted in the attempt to uncover any meaningful people based business intelligence and Hoffman confirms “It was amazingly difficult to do the simplest of HR tasks using spreadsheets.”

Having worked in large organisations such as Volkswagen, and carried out assignments in the Public Sector, he was familiar with a range of HR software solutions. But with no budget and a requirement to implement something immediately, many of the traditional solutions were not going to make the shopping list. Discovering Octopus provided an answer to the need for HR information and automation without a large capital outlay and in record time. “We didn’t have £50k for a product evaluation exercise and to buy hardware – in fact we had no budget for an HR solution at all”.

The hidden cost of complex implementation projects and the diversion of people from their core roles to man the project team was also saved. “The team at Octopus branded the system to our company identity and imported the data we gave them. All we needed was a single implementation day when I learned how to use the system – though it was genuinely intuitive and prior to the training I had already been able to find my way around.”

### Customer quote

“I’ve gone through many system implementations in the past and this is the first that has been so quick and easy with no negative impact on our core workload.”

# Case Study



## CHARTERIS

Employees didn't need any training as Octopus is truly intuitive.

Story cont...

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As a consultancy organisation a small proportion of Charteris employees work in Charteris' own offices. Instead people may spend as long as 18 months on assignment at client sites, working from the client office combined with occasionally working from home.

“People can't just wander past my office to ask questions about HR policies, procedures, benefits and so on. The solution had to provide self service so people could easily find this information for themselves whenever they need it, rather having to wait for a reply to emails.”

Employees have been very positive in their feedback on Octopus. They appreciate the convenience of checking and updating their own details and being sure they are accurate and current. Charteris HR policies, procedures and employee benefits information is on the system and people can answer their own HR and benefits queries when it's convenient to them without having to wait for a response from HR. “They didn't need any training as Octopus is truly intuitive – they just had a user name and password sent to them and got on with logging in and making use of the solution.”

Charteris need to maintain accurate data about absence and to be able to track holiday against entitlements, but “there was no real process for recording it before and it often just didn't happen.” Using Octopus all employees can apply for holiday wherever they have a computer connected to the internet using an automated on-screen paperless process, and managers receive an email of the request from which they can directly click on accept or decline. If they authorise the leave, records and totals are updated automatically by Octopus. It means it's straightforward for Charteris to maintain accurate information.

### Customer quote

“They didn't need any training as Octopus is truly intuitive – they just had a user name and password sent to them and got on with logging in and making use of the solution.”

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## CHARTERIS

Octopus delivered additional benefits beyond those that had been originally looked for...

Story cont...

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Business information from HR is now quick and easy to produce, saving time and money over the time wasting exercise of creating spreadsheets from the old incomplete data. “All the practical and useful information we need is available on reports and analyses.” Charteris often tender for public sector contracts where diversity information is required, and Octopus has instant reports on employee numbers and age, ethnicity and disability.

Once Octopus was up and running at Charteris with employee information, Charteris found it delivered additional benefits beyond those they had originally looked for. “Octopus has helped us streamline our implementation of best practise HR processes.” As an example the alerts and reminders ensure that when employee starts work their probation period is recorded, and reminders can be sent to HR, the manager and the employee when the end of probation period approaches. As a result end of probation reviews and employee confirmations are carried out, which tended to be overlooked before.

Hoffman had suggestions for developing Octopus further as he identified that a simple change to the functionality of Octopus could deliver a significant additional benefit. The team at Octopus took on his suggestion of creating a login for new starters to access selected information before their start date. This process gave new employees a starting point of looking at company information, downloading new starter forms and being able to take these in on day one, be prepared with questions and ready to be up and running in their new role much more quickly than usual.

### Customer quote

“We were told that regular updates and new functionality would be provided as part of our monthly subscription to Octopus and it was interesting to see one of our own suggestions readily accepted and successfully implemented.”

He praises the Octopus team as providing a “friendly, knowledgeable, and responsive” service throughout the implementation and beyond.

# Case Study



CHARTERIS

The final word...

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Barry Hoffman concludes that “through its quick implementation and rapidly achieved business benefits, allowing us to deliver a quality HR service and successfully support the business, Octopus has allowed us to demonstrate our own success as an *agile enterprise*.”

Octopus

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