Head of the Class

Prestigious, historic research organization uses SyncHR and NetSuite to save up to 60 hours across payroll processing and open enrollment operations.

CHALLENGES

- Improving efficiency in benefits, payroll, and other people operations
- Enhancing data security, accuracy, and currency
- Increasing visibility and transparency into core HR operations
- Enabling greater employee self-service

SOLUTION

- The Institute for Advanced Study is using SyncHR along with NetSuite to automate essential benefits, payroll, and time-off accrual functions.
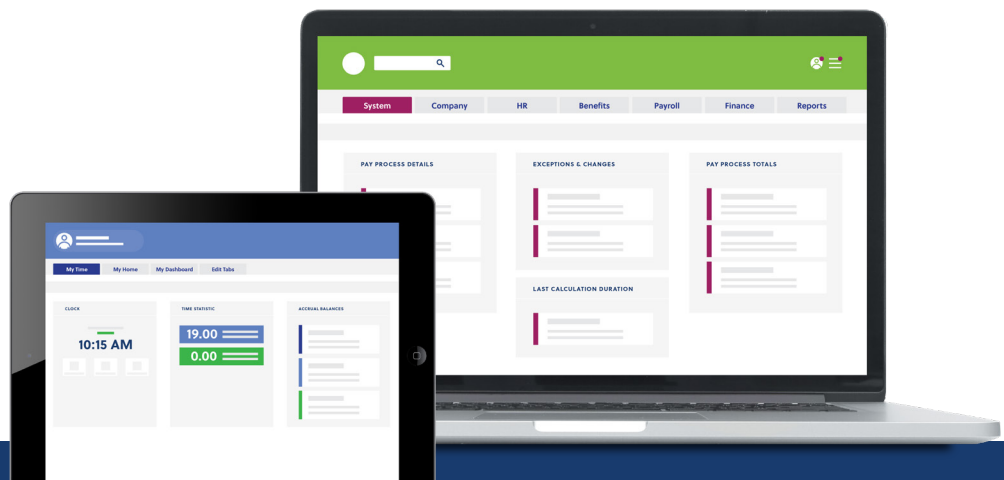
BENEFITS

- Reduced payroll processing and validation from 15 hours per week to just minutes
- Enabled self-service benefits selection and enrollment, complete with automatic transmission to benefits carriers
- Eliminated more than 30 hours of manual benefits processing each month
- Improved campus-wide connectivity and data transfer

Intellectual opportunity at risk

Established in 1930, the Institute for Advanced Study (IAS) has been the gold standard for scholarly research ever since. Home to professors like Albert Einstein and historic figures, the Institute's community of scholars has grown to include more than eight thousand historians, mathematicians, natural scientists, and social scientists from more than thirty different countries.

The opportunity to conduct your research in a community of scholars as prestigious as the Institute comes with more than just the name recognition – it comes with benefits and compensation in the form of salary, stipends, and a benefits package. But the Institute's laser-like focus on cultivating the most exclusive collections of thinkers and visionaries occasionally came at the expense of other, less lofty or noble pursuits.

"Many of our core daily business operations — training, payroll, and benefits administration — were still done manually in spreadsheets and run on a mainframe computer with highly customized software that only two people on the planet knew how to use," says Jeff Berliner, Chief Information Officer at IAS. "The level of risk it posed to both our network and data security as well as our operational efficiency made it clear we needed to modernize our entire approach to running the organization using more integrated, accessible, and secure systems."

Disparate systems, disjointed people operations

For years, the mainframe enterprise resource planning (ERP) system The Institute used to support its critical business functions forced individual departments and teams to work in isolation and devise their own processes and strategies for executing their daily tasks. Yet, even after replacing it with NetSuite — a modern, cloud-based solution that eliminated many of the most pressing security and visibility concerns while enabling the team to better connect various tools — the problems persisted.

"Moving to NetSuite was a huge upgrade for us, since it's a more secure, extensible, and easier to manage system than an outdated mainframe," Berliner says. "The problem, however, was with some of the other tools, especially our HCM solution, that we wanted to connect weren't as robust or easily configurable as we'd hoped."

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Berliner explains that The Institute's original HCM provider couldn't deliver on many of the most essential promises the platform made. In particular, the payroll functionality that was intended to integrate seamlessly with NetSuite didn't and resulted in the HR team having to implement additional manual processes to cross-reference data for accuracy and completeness.

"Every time we ran a payroll, it required three people to review the numbers and make sure they're right or make adjustments like retro payments that might be needed," he says. "We did this every month for salaried staff and biweekly for hourlies, while having to manually separate them into different categories, which could take us up to 15 extra hours per week every payroll cycle."

BENEFITS GET LEFT BEHIND

Of course, payroll integration was just one issue The Institute had to contend with. Berliner says that other tools like recruiting and benefits administration also failed to live up to their billing — an assertion supported and experienced first-hand by IAS's Chief Human Resources Officer Jennifer Richardson.
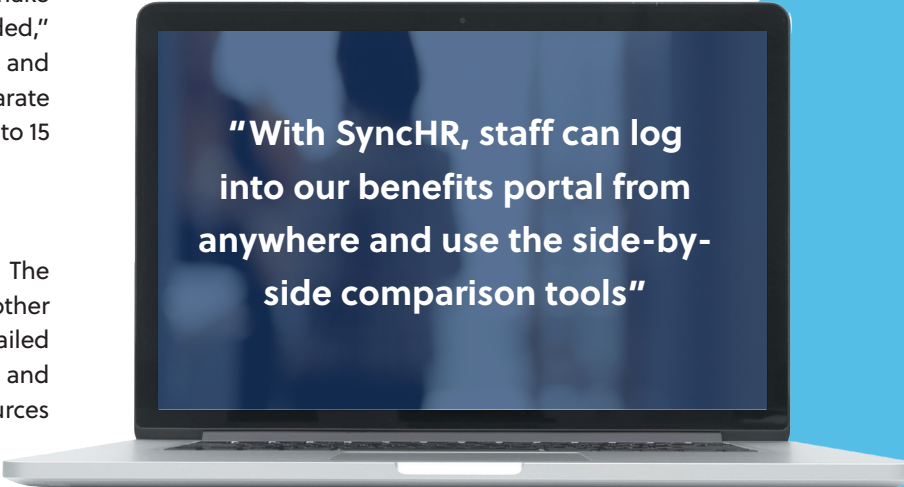
According to Richardson, benefits administration had long been the responsibility of one just one person who collected employees' enrollment preferences and manually executed their requests. "Our benefits specialist could spend as many as 30 hours every month managing enrollments, qualifying events, and communications," Richardson says. "Add that to payroll and other functions and it became a full-time role dedicated just to manual data management."

Consolidating those responsibilities to just one person wasn't just inefficient, it also created some bigger problems down line. "Once that person retired, all the institutional knowledge and specific processes for benefits management and other functions left too," she says. "Not only did it leave us with some significant visibility gaps and one less resource to get the job done, but it also revealed just how much the rest of the team didn't know about what was going on until we had a chance to dig in and review all the records."

Seamless integration and advanced automation for simplicity and efficiency

Eager to find a more intuitive, transparent, and efficient system for managing vital people-related functions, IAS deployed SyncHR HCM. In particular, The Institute chose SyncHR for its seamless and security integrations with NetSuite, centralized database for accurate and updated employee data, and rich automation capabilities that streamlined previously time-consuming manual processes.

With SyncHR, IAS can automatically calculate and communicate employee paid time off balances, apply holiday pay, and other payroll adjustments automatically to save time, effort, and frustration. The platform's tight integration with NetSuite eliminates many of the data security, accessibility, and accuracy concerns IAS had with

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its previous system, while also accelerating fundamental operations like payroll processing and benefits administration.

"Since SyncHR aggregates data in real-time and centralizes it to a single database, we can better control who sees it, how it's used, and feel more confident that every line of information is accurate and up to date," he says. "The solution's automation functionality means that activities like payroll processing and validation that used to take us 15 or 20 hours per week can now be done in a matter of minutes."

More importantly, he says that combining SyncHR with NetSuite has helped the organization significantly improve the campus experience for faculty and fellows, regardless of whether they're physically on-site or working remotely.

According to Berliner, using SyncHR with NetSuite closes a number of significant gaps between systems that previously created more manual work for the payroll staff and added unnecessary costs to daily operations. Now, IAS can use NetSuite to capture on-campus payments from ID card swipes connected to the ERP and add them to an accounts receivable summary for each employee. From there, the data flows to SyncHR, which automatically deducts those line items from payroll and transmits the information back to NetSuite to close the loop and help to ensure greater payroll accuracy.

At the same time, Richardson says that SyncHR has also been a revelation for the HR team's benefits enrollment and management efforts. The platform's benefits guidance, personalization, and global access from any internet-connected device has dramatically increased employee self-service and satisfaction, while also unburdening the HR team of dozens of hours of manual data management and communications with benefits providers each month.

"With SyncHR, staff can log into our benefits portal from anywhere and use the side-by-side comparison tools to select the benefits, assign beneficiaries, and customize their packages to best suit their needs," she says. "The carrier direct connection automatically transmits their selections to our benefits providers without any manual intervention, while providing us with complete transparency and detailed reporting so we can continually refine our offers to maximize cost controls and provide our staff with the best possible experience."

Both Berliner and Richardson agree that SyncHR is a massive and marked improvement over The Institute's previous HCM selections. And both look forward to continuing to build additional automation capabilities in the future that will further simplify daily operations and enhance the faculty experience. "The Institute exists to provide the optimal environment for today's top scholars to explore their most important curiosities," Berliner says. "It's time we put the infrastructure in place that allows us to fully support that mission, giving scholars tools which eliminate needless process and allow them to focus on their work."