APQC

Human Capital Management: Redeploy and Retire Employees

This document should be used as a guide in the offline collection of data. APQC cannot accept submissions using this file. Please contact the APQC helpdesk on helpdesk@apqc.org for more information about offline submission.

OSBC DATABASE PRIVACY AND PROTECTION OF PERSONAL INFORMATION
Please refer to APQC's privacy statement for disclosures relating to the collection and use of your personal information.

Instructions

Research project structure
APQC OSBC research projects are designed to collect a wide variety of information about your entire organization, with a specific emphasis on the particular business entity for which the research is being collected.

Each survey is divided into a number of sections, separated by a block of introductory text. The first section contains questions about your organization as a whole. The second section contains general questions about your particular business entity. Each of the subsequent sections of the research project presents questions about specific processes and activities in your business entity. Each of these process-specific sections corresponds to APQC's Process Classification Framework.

Before each section containing process-specific questions, you are presented with a list of components of the PCF. This list identifies which components of the PCF are addressed by this particular section of the research project. The numbers in the list correspond to the PCF's unique numbering scheme. Questions within the section will address specific activities for the stated component of the PCF.

Navigation, saving results, and submitting a survey
The survey is presented in pages. Each page has at least one question on it. Each question on each page should be answered. A survey may also have a question that must be answered in order to proceed. Required questions are identified by the word "Required" in red letters.

Use the buttons at the bottom of each page to navigate throughout the survey. To avoid data loss, do not use the browser "Back" and "Forward" buttons to navigate through the survey. As you navigate through the survey using the "Back" and "Forward" buttons, your data are saved to APQC's secure servers.

The progress indicator at the bottom of each page displays a bar graph and a percentage that indicate your progress in navigating through the survey. The progress indicator does not account for completed questions, only for your relative position in the survey.

To exit the survey before you have completed all questions, click the "Save" button at the bottom of the survey page, then close your browser. The system will present you a link to your particular instance of the survey. Use that link to return to the survey at any time.

Once you have completed the survey, click the "Submit" button on the last survey page. By submitting your survey results, you will notify APQC that your data are ready for validation. You will not be able to create, review, update or delete your answers after you have submitted the survey, so ensure that you have accurately documented your answers before you submit.

Cookies, one browser
The APQC OSBC survey tool uses a "cookie" to associate you to a particular survey instance. Your cookie is unique to the computer you used to start the survey and is the only key that you have to access your data. Should you lose your cookie, you will be unable to complete the survey and will need special assistance from APQC. Do not delete your APQC cookies until after you have submitted your survey data.

Because this cookie is unique to the computer you used to start the survey, other users will be unable to contribute results and data to the survey unless they have physical access to the browser you used to start the survey.

Visit the Browser Setup page for more information about configuring your browser to use cookies.

JavaScript
The APQC survey application uses JavaScript for enhanced validation and usability features. In order to complete these surveys, you must use a browser that supports JavaScript, and you must have JavaScript enabled. Visit the Browser Setup page for more information.

Printing
To print a copy of the entire survey, you should use the "Preview" version of the survey. This view consolidates all of the questions associated with the particular survey onto a single printable browser page. No answers or personal data are contained on the "Preview" version of the survey.

As you navigate through the survey, you may print each page to record your answers. There is no facility to review all of your answers on one page.

Definitions
Each survey has a set of definitions associated with it that are unique to the process grouping covered by the survey. Throughout the survey, questions may have links to survey definitions.

Accurate results depend on a common understanding of the terminology used across survey respondents, so take special care to review the definitions in the glossary thoroughly. Common terms may be defined differently than you expect. When in doubt, contact APQC for guidance.

Reasonable numbers
The survey asks for a number of detailed pieces of information. If you do not have the exact information that a question asks for, please provide a reasonable approximation. If you cannot provide a reasonable approximation, please leave the answer blank. If you are not sure, contact APQC for guidance.

Reporting period
All questions in the survey, unless expressed otherwise, request data from the last complete fiscal year of your organization's or business entity's operations. Please be sure to provide the end-date of the fiscal year for which you are providing data. If you have any questions about the reporting period, please contact the OSBC help desk. (Contact information is provided below.)

Question numbers may skip
Occasional changes to the survey may result in the addition or removal of questions. Due to this activity, the question numbers in the survey may occasionally skip one or more numbers. Furthermore, some surveys will hide questions depending upon answers to previous questions. If you have any questions about the order of questions in the survey, please contact the OSBC help desk.

Contacting APQC with questions
For any questions regarding the survey mechanics, the survey content, or general survey inquiries, please contact the OSBC help desk via telephone at +1.800.776.9676 (toll free, U.S. only) or +1.713.681.4020, or via e-mail at osbc@apqc.org.

General Background Questions
Regarding your entire organization

The questions on this page should be answered for the entire organization, including **all business entities** as well as the corporate headquarters.

Please provide your value responses with no currency marks, thousands separator, or other formatting. Also, a period should be used for a decimal mark, not a comma *(e.g. **1325.23**, not $1,325.23).*

*200.0010 Please indicate the currency (e.g. U.S. Dollar, Euro, Japanese Yen, etc.) used for monetary responses in this survey. *This question must be answered in order to proceed to the next page.*

  Choose one

200.0020 What is the total annual revenue of your entire organization? (Note that this question refers to the entire organization rather than the business entity defined for purposes of this survey effort.)

General Background Questions
Regarding the specific business entity completing the survey

Questions in the remainder of this survey should be answered for the **business entity completing this survey**.

Please provide your value responses with no currency marks, thousands separator, or other formatting. Also, a period should be used for a decimal mark, not a comma *(e.g. **1325.23** not $1,325.23).*

200.0030 Which of the following statements best describes the role that your business entity performs in the corporate organization? *(Select only one.)*

  An independent operation
  Headquarters for global operation
  Manufacturing/operating unit
  A subsidiary of a parent company based in your country
  A subsidiary of a parent company based in another country
  Shared services center/centralized processing unit

200.0040 Provide the end date of the twelve-month period for which your business entity will be providing data. *(All questions in the survey, unless expressed otherwise, request data from the last complete fiscal year of your organization's or business entity's operations. Pro-rata data are not acceptable, only actual data should be submitted. Please be sure to provide the end-date of the fiscal year for which you are providing data. If you have any questions about the reporting period, please contact the OSBC help desk on osbc@apqc.org.)*

Period end date

a.Year	b.Month
* Choose one	* Choose one

200.0050 What is your business entity's total annual revenue? *If your business entity is a support unit such as a shared services center*

and therefore does not directly generate revenue, then provide the revenue amount for the units/business entities you support. (Government/public sector respondents, please use budget authority, fees and other funding directly associated with the delivery of services under your mission, excluding from revenue funds that are not retained within your organization for internal use, i.e., "pass through" funds such as grants; benefit payments; and royalties, fees, and debt collections.)

Total annual revenue

200.0060 What is the total annual cost of continuing operations incurred by your business entity?

Total annual cost of continuing operations:

200.0070 What is the total annual .selling, general and administrative (SG&A) costs incurred by your business entity? For purposes of this question, SG&A costs include all compensation and benefits (excluding incentive compensation), direct operating costs, supplies, maintenance time and expenses, subscriptions, publications, and related costs.

Total annual selling, general and administrative (SG&A) costs:

200.0080 What is your business entity's total annual cost of goods sold (COGS)?

Total annual cost of goods sold (COGS):

200.0090 In how many countries, including your own, does your business entity operate?

Total Number of Countries:

200.0100 In what region(s) do your business entity's customers live? *(Select all that apply.)*
   Africa and Middle East
   Asia-Pacific
   Central and South America
   Europe
   U.S. and Canada

200.0110 Which of the following best describes the customer strategy for your business entity? *(Select only one.)*
   Cost leadership
   Product/service differentiation
   Focus on the customer

200.0120 Which of the following terms best describes the market conditions in which your business entity mainly operates? *(Select only one.)*
   Relatively new, emerging market
   Growth market
   Mature market
   Generally in decline

200.0130 Which of the following best describes how your organization analyzes the behaviors of its key customers (eg. hiring managers, candidates, active employees retires)? (Options are listed in increasing order of maturity. Please select the highest level of maturity that your organization has achieved. Select only one.)
   Segmentation (when done) is against a single variable. Most behavior analysis is based on internal experience and knowledge of past patterns.
   Business units develop segmentation models and simple patterns of behavior based on account history and demographics.
   Enterprise segmentation models are based on multiple variables; some predictive modeling is used.
   We have a holistic view of data with robust micro-segmentation and models to predict behavior patterns, which are shared across the enterprise.
   We use advanced multidimensional segmentation to identify customer value (e.g. satisfaction ratings, retention), while real-time self-adjusting algorithms drive insights into response patterns.

200.0140 How are customer (eg. hiring managers, candidates, active employees, retirees) interactions tracked, monitored and measured? (Options are listed in increasing order of maturity. Please select the highest level of maturity that your organization has achieved. Select only one.)

Some efforts are made to track customer interactions and understand pain points. Customer activities are logged by channel.

Departments or business units are responsible for broad tracking and analysis of customer interactions.

We have an enterprise-wide program to track interactions and evaluate outcomes. We are able to understand all customer activities across channels in a single view.

Enterprise wide, we track customer interactions across channels, and we use this as an input to continuous improvement. Customer activities on one channel are visible to all channels in a timely manner.

All activity details and communications, including teaming with external partners, are available across and between all channels, such that we can seamlessly monitor customer interactions across our entire enterprise.

200.0150 Which of the following does your business entity regard as its top three business objectives? (Select up to three.)

Increased profitability
Reduced cost
Improved quality
Innovation
Increased revenue
Increased unit volume
Reduced cycle time
Increased customer responsiveness/service

200.0160 Does your organization use an enterprise resource planning (ERP) system to coordinate key business information, resources, and activities across the value chain?

Yes
No

200.0170 Real-time data is integrated and organized so internal users can access consistent applicable real-time information.

	1 - Strongly disagree	2	3	4	5 - Strongly agree	6 - Do no know
Real time data integration						

200.0180 Please provide the following demographic information for the workforce at your business entity.

- **a. Total number of employees** (temporary, part-time, and full-time headcount) employed by your business entity for the 12-month period for which you are providing data.
- **b. Total number of FTEs** at your business entity. If your business entity is a support unit such as a shared services center, please include FTEs for the areas you support.
- **c. Total personnel cost of FTEs** employed by your business entity for the 12-month period for which you are providing data. (Use a decimal if needed.)

Demographic	Value
a. Total Number of Employees	
b. Total Number of FTEs	
c. Total Personnel Cost of FTEs	

200.0190 How many of your business entity's employees in question 200.0160a are in each staff category listed below?

Staff Category	Number of Employees
a. Senior management/executives	
b. Middle management/specialists	
c. Operational workers/office staff	
d. Total	

200.0200 What is your assessment of your business entity's overall performance relative to industry peers?

Top Quartile
Middle Half
Bottom Quartile

200.0210 Which of the following best describes your organization's maturity with regards to information availability and analysis capabilities? (Options are listed in increasing order of maturity; select the option that best describes your organization's maturity.)

We don't have regular access to data beyond basic transactions. Data is stored in spreadsheets or system extracts. Analysis is not performed on a regular basis and decisions are based on instinct or anecdote.

Data is in department or line-of-business silos. Insight generation is only performed on an ad hoc or periodic basis. Decisions may be supported by data, but are primarily based on past experience.

Structured operational data is available and may include some basic external data. Insights are generated at department or line-of-business level. Decision making is focused on analyzing past actions and consequences.

Traditional and unstructured data is integrated and available from enterprise sources as well as some external data. While data is available to many people based on their roles and needs, using it might require some technical assistance. Decision making involves historic analysis and predictive algorithms.

Real-time internal and external data is readily accessible across the enterprise based on need. Information is shared extensively across the enterprise. The data is integrated real-time and users can access, manipulate and visualize data on demand. Data-driven decision making is part of the organization's culture.

This concludes the background and demographic component survey.
Survey Scope

This survey is designed to be modular in nature. The following processes and activities associated with the process group "Redeploy and retire employees" are addressed by this survey:

- **6.5 Redeploy and retire employees**
  - **6.5.1** Manage promotion and demotion process
  - **6.5.2** Manage separation
  - **6.5.3** Manage retirement
  - **6.5.4** Manage leave of absence
  - **6.5.5** Develop and implement employee outplacement
  - **6.5.6** Manage deployment of personnel
  - **6.5.7** Relocate employees and manage assignments
  - **6.5.8** Manage employment reduction and retirement
  - **6.5.9** Manage expatriates
  - **6.5.10** Manage employee relocation process

Reminder: Please answer all questions consistently from the perspective of the business entity respondent and from the same time period (the 12-month period for which your business entity will be providing data in this survey).

206.0010 Of your business entity's total number of HR FTEs, what was the number of full-time equivalents *(FTEs)* employed to perform the "redeploy and retire employees" process group for your business entity? *(Fill in for each column; use decimals if needed.)*

Staff Category	Number of FTEs
a. Senior management/executives	
b. Middle management/specialists	
c. Operational workers/office staff	
d. Total FTEs employed to perform the process *re-deploy and retire employees* (sum of a through c)	

206.0020 Of your business entity's total number of FTEs for the "redeploy and retire employees" process group, what percentage are employed to perform each of the following processes? (Must total 100%.)

a. Manage promotion and demotion process	%
b. Manage separation	%
c. Manage retirement	%
d. Manage leave of absence	%
e. Develop and implement employee outplacement	%
f. Manage deployment of personnel	%
g. Relocate employees and manage assignments	%
h. Manage employment reduction and retirement	%
i. Manage expatriates	%
j. Total	%

206.0030 Of the total annual cost of your business entity's HR function, what costs are associated with "redeploy and retire employees"?

	Cost
a. Internal costs	
b. Outsourced costs	
c. Total cost (sum of a through b)	

206.0040 For the "redeploy and retire employees" process group, what was the approximate percent allocation of total annual internal costs *(question 206.0030a)* across the following cost categories? *(Must total 100%)*

Provide percentages as whole numbers between 0 and 100.

Cost categories	Percentage
a. Annual personnel costs	%
b. Annual systems costs	%
c. Annual overhead costs	%
d. Annual other costs	%
e. Total internal cost *(Must total 100%)*	%

206.0050 For the process group "redeploy and retire employees," which of the following best describes your business entity's role? (Select only one.)

Self supporting; performs most aspects of process
Relies on other business units for the process
Relies on shared services center for the process
Serves as a shared services center for the process
Outsourced to third party

206.0060 What is the percentage split of how "redeploy and retire employees" services are delivered to the business by the following? *(Must total 100%.)*

Services delivered	Percentage
a. Shared service center/centralized processing unit	%
b. Third-party provider *(outsourced)*	%
c. Business-based HR roles	%
d. Corporate HR	%
e. Line managers	%
f. Total *(Must equal 100%)*	%

— Page Break —

206.0070 Which of the following systems does your business entity utilize to support the process group "redeploy and retire employees"? *(Select all that apply.)*

Meta4/Cyborg
HR Access
SAP
Rebus/Peterborough
Lawson
Oracle *(includes Peoplesoft, J.D. Edwards and other Oracle products)*
CHRIS
Micropay/Ingenuity
Internally developed
Spreadsheets *(Excel or equivalent)*
Outsourced to external vendor
Other

If you selected "Other," please specify.

206.0080 Which, if any, self-service models have been implemented by your business entity for the "redeploy and retire employees" process group? *(Select all that apply.)*
Employee Self-Service (ESS)
Manager Self-Service (MSS)
No self-service model implemented

206.0090 What is your business entity's average cycle time *(in days)* for processing an employee's retirement *(i.e., moving the employee and payroll onto the pension list)*?

Average cycle time

206.0100 Does your business entity have a knowledge transfer plan in place for employees approaching retirement?
Yes
No

206.0110 What options does your business entity offer to employees with regard to employees approaching retirement? *(Select all that apply.)*
Flexible work schedule
Phased retirement
Alternative career paths
Other

If you selected "Other," please specify.

206.0120 What is your business entity's average cycle time *(in days)* from request for leave of absence to confirmation of absence to employee?

206.0130 For the following staff categories, what was the number of vacancies at your business entity filled by internal candidates?

Staff Category	Number of vacancies
a. Senior management/executives	
b. Middle management/specialists	
c. Operational workers/office staff	
d. Total number of vacancies (sum of a through c)	

206.0140 What is your business entity's average cycle time *(in days)* for the internal transfer process? *(From request for internal transfer to completion of transfer)*

Average cycle time

206.0150 What percentage of employees at your business entity were redeployed for reasons other than filling a vacancy?

Percentage of employees

%

206.0160 For the following staff categories, how many voluntary employee terminations were there at your business entity?

Staff Category	Number of voluntary terminations
a. Senior management/executives	
b. Middle management/specialists	
c. Operational workers/office staff	
d. Total number of voluntary employee terminations (sum of a through c)	

206.0170 What were the reasons for redeployment at your business entity? *(Select all that apply.)*
    Promotion
    Organization restructuring
    Meet changing business priorities
    Position elimination/Right Sizing
    Employee request (internal transfer request)
    Poor fit in current position
    Other

If you selected "Other," please specify.

206.0180 For the following staff categories, how many involuntary *(i.e., permanent layoff, redundancy, termination for cause, etc.)* employee terminations were there at your business entity?

Staff Category	Number of involuntary terminations
a. Senior management/executives	
b. Middle management/specialists	
c. Operational workers/office staff	
d. Total number of involuntary employee terminations (sum of a through c)	

206.0190 What was the total number of employees your business entity relocated within your country?

Total number of employees

206.0200 What was the total cost of relocation expenses paid by your business entity to employees?

Total cost

206.0210 What percentage of your business entity's work force were expatriates?

Percentage of work force

%

206.0220 What was your business entity's total expenditure for repatriation?

Total expenditure

206.0230 What was your business entity's total expenditure for expatriation?

Total expenditure

206.0240 How many routine inquiries do you receive each month for the process group "redeploy and retire employees"?

Number of routine inquiries

206.0250 How many non-routine inquiries do you receive each month for the process group "redeploy and retire employees"?

Number of non-routine inquiries

206.0260 What is the percentage split of how "redeploy and retire employees" inquiries are received for the following communication channels? (Must total 100%.)

a. Digital	%
b. Non-digital	%
c. Total	%

206.0270 What is the average response time *(in hours)* for a routine inquiry regarding the "redeploy and retire" process group? *This time should represent the time taken from the point at which the inquiry is received to the point at which the inquiry is responded to (beyond auto-responder, an actual answer) and not the actual time spent by an individual working on the inquiry.*

Average response time

206.0280 What is the average response time *(in hours)* for a non-routine inquiry regarding the "redeploy and retire" process group? *This time should represent the time taken from the point at which the inquiry is received to the point at which the inquiry is responded to (beyond auto-responder, an actual answer) and not the actual time spent by an individual working on the inquiry.*

Average response time

206.0290 Thinking about your entire "redeploy and retire employees" operation, what do you see as the key operational practices or management techniques that contribute to your organization's success, if any? *(Please list the top three.)*

206.0300 What additional "redeploy and retire employees" measures would you like to see included in future reports? For a list of current measures, click here.

206.0310 Please indicate whether your organization would like to discuss the benchmarking results to learn more about reasons for possible performance gaps.

Yes
No

You have reached the end of the survey. You can use the **previous** button to review your answers for accuracy and reasonableness. After

pressing the **submit** button, you will no longer be able to directly edit your data in this survey form.

In order to obtain a printed version of your completed survey, you will need to print each page **before** submitting your responses. After you select **submit**, you will be unable to print your completed survey.