

WEBROOT K2 CASE STUDY



WEBROOT
USES K2 TO
GET NEW
EMPLOYEES UP
AND RUNNING
FAST

LOCATION Boulder, Colorado, United States

INDUSTRY Technology

COMPANY PROFILE Founded in 1997, Webroot provides industry-leading Internet security solutions for consumers, enterprises, and small and medium businesses worldwide. Webroot products consistently receive top review ratings by respected third parties and have been adopted by millions of users worldwide.

PARTNER PROFILE Toronto-based Caprivi Solutions, workflow and automation specialist, develops reusable and code-free solutions to solve common industry problems and enhance business operations.

SOFTWARE K2, Microsoft SharePoint, InfoPath, Numara FootPrints for desk management

SOLUTIONS HR onboarding and more

SIZE Over 300 employees

BENEFITS Employees 100 percent onboarded before their first day
Enhancements to existing SharePoint and InfoPath investments
Reporting and visibility
Full audit trail
Reusable workflows and tools
Error elimination

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PROBLEM

Onboarding a new employee is a complex process involving many people across many departments, and the goal is often to have a new employee completely ready to go before their first day on the job.

Webroot's manual system for onboarding each of its new hires was poorly defined and lacked process visibility. Bringing on multiple new employees at the same time only added to the complexity. Just keeping track of paper-based forms took considerable time and effort, and even worse, the manual procedures left the door open for errors and compliance issues.

Webroot had been using Microsoft SharePoint for basic content management and collaboration, but it had never built or implemented a workflow.

"The driver was that Webroot needed to have a process that ensured 100-percent, day-one readiness for a new employee," said Fabio Casti, principal at Caprivi Solutions. "We talked about what we could do within SharePoint and how we could get to where it wanted to go. That's where Caprivi and K2 came in."

SOLUTION

After an evaluation of other systems, Webroot selected the K2 employee onboarding solution developed by K2 Partner Caprivi Solutions.

"We needed a better tool, something we could use repeatedly and something we could manage in-house. We weren't in the market for a proprietary solution that would lock us in," said John Reading, manager of IT business systems at Webroot.

Based on SharePoint and the K2 platform for business apps, the new fully automated system is kicked off when Webroot's hiring manager makes a request for a new employee on an electronic InfoPath form. At every step, the system creates tasks and sets workflows in motion. For example, it launches background

checks that go to HR for approval; it prompts facilities to prepare a nametag, desk, computer and chair; then it prompts IT to set up an email account and create permissions. Orientation meetings with HR and relevant line managers are also automatically scheduled well before the employee arrives, ensuring maximum productivity from day one.

Rules and policies prevent errors and guarantee information and approvals are routed to the right people at the right time. Escalations ensure the process never gets stalled. A complete audit trail is kept on all activity, and full, real-time visibility offers valuable insight and allows Webroot managers to make better decisions.

"It really makes people think about their processes, define them better, and set expectations right and according to schedules," Reading said.

After spending a day with users early in the consulting phase, Caprivi mapped out the processes then handled the solution installation and configuration. It demonstrated the system for users, implemented the final iteration, and provided training on how to reuse the tools and manage the process.

"We got out of it exactly what we hoped to, both from the K2 tools and from Caprivi," Reading said. "They were genuinely knowledgeable, gave us reasonable timeframes, then met them and provided great support."

Webroot is now reusing K2 components to streamline some of its legal processes.

"We can use K2 not just for one solution, but to build new solutions as needs arise," Reading said. "Potentially, we could reuse the K2 software and Caprivi's best practices in all areas of the business for all kinds of needs."