DRAGON HCM

MID-MARKET BUSINESS GUIDE

How Connected Is Your Ecosystem?

A Practical Change Assessment

This is designed to help you understand your business’s internal connections, its ecosystem of knowledge, and the effort that it takes to keep work moving behind the scenes. This is your chance to decide what to preserve and where change could help.

Dragon HCM uses this model to assist clients in engaging with an ecosystem health check and a practical plan to implement change that will take you into tomorrow.



Let us connect your world.

FIRST WORKING DRAFT / FOR REVIEW

01 / BEGIN THE REVIEW

Begin with one process. Understand how it works.

The ecosystem health check starts by following real work. Choose a process that matters to your business, then learn what supports it and where change could help.

Choose a question worth answering

Can a growing number of business processes be handled accurately without adding more people to process data? Or can someone cover a critical process when its usual owner is away?

Choose one process and a useful period

For example, follow recent hires over a representative period, such as 12 months. Look at onboarding and payroll, employee experience and feedback, retention, and progress toward manager-set goals. These are signals to investigate, not proof that the process caused an outcome. Evaluate the process, not the individual.

Or follow IT hardware provisioning: from an approved request through configuration and delivery to a usable device. Choose the period and evidence that fit the work.

First, Seek to Understand

Protect valued capabilities, controls, relationships, and local practices. Before changing a workaround, ask why it exists and which need it satisfies. Was it created because equipment failed, system data was missing, or another dependency was not met? Understand the need before deciding what to preserve or change.

Set the question and boundaries first

Agree what the investigation should answer and what is in scope. Then select a small hiring cohort and trace the evidence using the plan on the next page.

02 / BUILD THE EVIDENCE

Follow a cohort. Find the shared patterns.

Start with about 10 people hired in the same quarter across different areas, including those who have since left. Trace their first three to four quarters retrospectively. Where evidence is missing, record the gap and begin prospective tracking rather than reconstructing facts from memory.

Replace names with case IDs and use only relevant information. Apply the same questions consistently. An independent perspective can reduce bias, not eliminate it; record assumptions and differences between roles.

AREA	WHAT TO TRACE	POSSIBLE EVIDENCE
Onboarding & training	Readiness, training delivery, and time to role-appropriate productivity.	Plans, attendance, manager-set milestones.
IT access	When required permissions and equipment became usable.	Access approvals, tickets, delivery records.
How work is learned	SOP availability, in-person instruction, and undocumented knowledge.	Procedures, coaching notes, walkthroughs.
Compliance training	Applicable assignments, completion, overdue items, and follow-up.	Training register, completion records.
Payroll	Accuracy of initial and later pay; corrections and resolution time.	Pay records, correction logs, inquiries.
30 / 60 / 90 days	Follow-ups and brief surveys: clarity, support, integration, and barriers.	Check-in notes, short consistent surveys.
Later outcomes & exits	Retention, integration, role-appropriate productivity, and neutral departure reasons.	Milestones, exit feedback, recorded reasons.

Log the source and missing evidence for each finding. Use this limited sample to investigate information silos and key-person dependencies, not rate individuals, establish a benchmark, or prove causation. Separate observed facts from explanations still to be tested.

03 / MAP THE ECOSYSTEM

Look at the connections, not just the applications.

An information silo is not simply a separate tool. It matters when the next team cannot obtain, interpret, or trust what it needs.



Shared dependencies: approved facts · effective dates · ownership · completion evidence

Record the handoff

For each connection, identify the authoritative record, what moves, who receives it, the transfer method, and how errors or delays are resolved.

Include the informal layer

Spreadsheets, email, tickets, conversations, and external providers may be essential parts of the ecosystem. Include them without assuming they should disappear.

EXAMPLE: LOCATION AND ROLE CHANGE

Source	Approved change record with an effective date.
Recipients	Payroll, IT, finance, spend-policy and timekeeping owners, as applicable.
Verification	Each owner confirms its own action; unresolved items remain visible.
Question	Where does a person have to re-enter, interpret, or chase the same change?

04 / FOLLOW ACTUAL WORK

Observe the steps. Understand the decisions.

Ask a knowledgeable colleague to walk through representative work, including an exception. Validate the account with everyone involved.

OBSERVE	CAPTURE	WHY IT MATTERS
Trigger & finish	What starts the work; what proves it is complete.	Avoid stopping at a transaction when follow-up is still open.
Information	Where facts originate; what is checked or interpreted.	Distinguish reliable inputs from assumptions or stale copies.
Decision & exception	Rule used, judgment required, and escalation owner.	Make the unusual case understandable, not invisible.
Handoff & control	Who acts next; approval, reconciliation, and evidence.	Preserve useful controls while identifying repeated handling.

Do not automate the uncertainty

A screen recording can show clicks. The team must also explain why a choice was made, which exceptions apply, and who can authorize a different path.

05 / UNDERSTAND THE WORKAROUNDS

Yesterday’s practical fix deserves a fresh look.

Temporary arrangements often become part of everyday operations. Review their present purpose rather than judging the reason they were created.

PATTERN	INVESTIGATE	POSSIBLE RESPONSE
Duplicate records	Which copy is authoritative? Why is another maintained?	Retain a needed view; remove or connect unnecessary re-entry.
Manual bridge	What does the export, email, or spreadsheet accomplish?	Document a necessary bridge or test a more reliable transfer.
Repeated checking	Does the check prevent a real error, or compensate for an unreliable input?	Preserve the control; improve the upstream cause where possible.
Local variation	Is the difference required by the work or inherited from an old arrangement?	Keep justified variation; standardize where it adds value.

Keep an evidence-based finding register

For each finding, record an observed example, impact, owner, uncertainty, and next test. Use “needs validation” rather than treating an assumption as a defect.

06 / MAKE KNOWLEDGE TRANSFERABLE

Experience is an asset. Make it available to the team.

Key-person dependency exists when an essential outcome relies on knowledge or access that an authorized colleague cannot readily use.

Capture more than the click path

A usable operating procedure includes the purpose, prerequisites, inputs, decision rules, checks, exception route, required access, and evidence of completion. Assign an owner and a review date.

Test the coverage

Ask an authorized backup to use the instructions on a safe representative case. Record where they need explanation. Confirm they have appropriate access and know which decisions must be escalated.

EXAMPLE / A LATE APPROVAL BEFORE PAYROLL

A click-by-click guide may say “enter the change.” A transferable procedure also explains the cutoff, how to establish the effective date, who approves an exception, what to reconcile, and when the employee or manager needs an update.

Separate three forms of continuity

People

Can a trained backup take over?

Process

Are rules and completion checks available?

System

What is the authorized fallback during an outage?

07 / MEASURE EFFORT AND IMPACT

Connect the operational findings to administration cost.

Use the same process scope, period, and supported population. Keep observed facts separate from estimates and proposed improvements.

300	8 minutes	40 hours
monthly events	handling avoided per event	monthly capacity

ILLUSTRATIVE ASSUMPTIONS ONLY: 300 x 8 / 60 = 40 HOURS PER MONTH

At an assumed $40 loaded hourly cost, 40 hours x 12 months represents $19,200 in annual capacity value. If pay and hours remain unchanged, it is not a $19,200 reduction in cash spending.

Build the current baseline

Add in-scope internal effort, software, and provider fees. Count each cost once. If reporting cost per employee, divide by the average supported population over the same period and state what is included.

Test the proposed change

Include setup, data preparation, integration, testing, training, project time, and overlapping contracts. Add ongoing support and maintenance. Check whether work falls overall or simply moves to another team.

Track service as well as effort

Record hands-on minutes, elapsed turnaround, corrections, and open exceptions. Waiting overnight is elapsed time, not a night of labor. Model lower adoption before relying on savings.

08 / COMPLIANCE AND TRAINING

Include obligations and worker training.

Growth, new locations, and changing roles are useful prompts to review applicable obligations and how the business delivers and records training.

A FEDERAL STARTING POINT

DOL FirstStep Employment Law Advisor

This interactive advisor helps identify major federal laws administered by the U.S. Department of Labor and associated recordkeeping, reporting, and notice obligations. Its information can be printed as a reference guide. Save the date, business facts used, and questions needing follow-up.

Review the training already in place

TOPIC	WHAT TO CHECK
Sexual harassment and discrimination prevention	Relevant employee and supervisor content; reporting routes; required audience and timing where applicable.
Workplace violence prevention	Site-specific risks, prevention and response procedures, and the applicable jurisdiction or sector rules.
Role-specific safety	Training matched to actual tasks, hazards, equipment, and changes in work; appropriate competency checks.

For each topic: record the owner, provider/content version, assigned workers, completion evidence, renewal dates where applicable, overdue follow-up, and language/access needs.

Scope: requirements vary. FirstStep does not cover every DOL law, other federal agencies, or state/local rules. Check relevant authorities. Further guidance: EEOC prevention practices; OSHA workplace violence. Reviewed November 17, 2026.

09 / MAKE A DECISION

Turn the assessment into a change brief.

A useful result may be a clearer procedure, better coverage, a targeted integration, or a system change. The destination is not predetermined.

Compare options against the same outcome

Preserve & document	Keep effective systems and controls; make essential knowledge usable.
Improve & connect	Address the handoff or process that creates unnecessary effort.
Replace selectively	Change the component that no longer meets the need, with a tested transition.

Your decision brief should contain

The business outcome and boundaries; a current-state map; observed findings and uncertainties; the cost and service baseline; options and trade-offs; a pilot owner; training and fallback arrangements; and the measures that determine whether to expand.

Start with the work your business needs to accomplish.

Dragon HCM can help capture how that work happens, evaluate the evidence, and design a practical next step. The assessment comes before a technology recommendation.

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Method note: This is a Dragon HCM assessment framework, not a benchmark or vendor score. Continuity reference: Vermont Emergency Management, Business Preparedness Workbook. Examples are fictional. Working draft for review.

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BUSINESS ECOSYSTEM REVIEW

Let us do the review with you.

If this review falls outside your team’s experience, or you simply do not have time to take it on, Dragon HCM can do the assessment for you.

We work with the people who know your business to document actual workflows, assess the connections, and turn the findings into a prioritized plan.

Arrange a consultation with Dragon HCM.

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Let us connect your world.



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