

ASTD Learn From The Best On Boarding Excellence: A Case Study in Exceptional Business Alignment

October 2008



On Boarding Excellence

CheckFree®

is now part of **FISERV**

Mission: (Why we exist)

- “To deliver on boarding operational excellence”

Vision: (What we want to be)

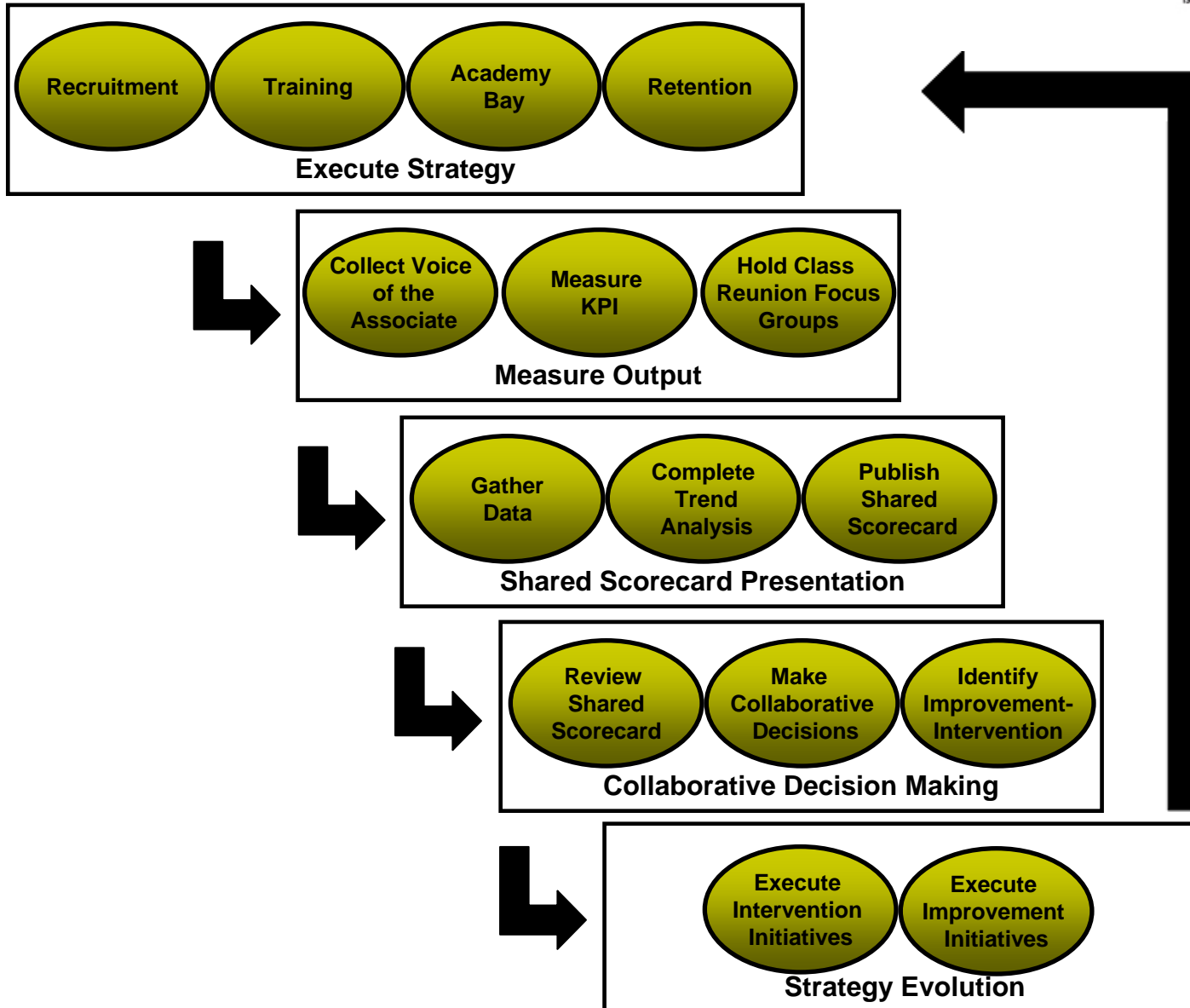
- “A successful cross-functional team that seamlessly evolves its on boarding strategies and execution tactics as business needs change”



On Boarding Excellence

CheckFree®

is now part of FISERV.

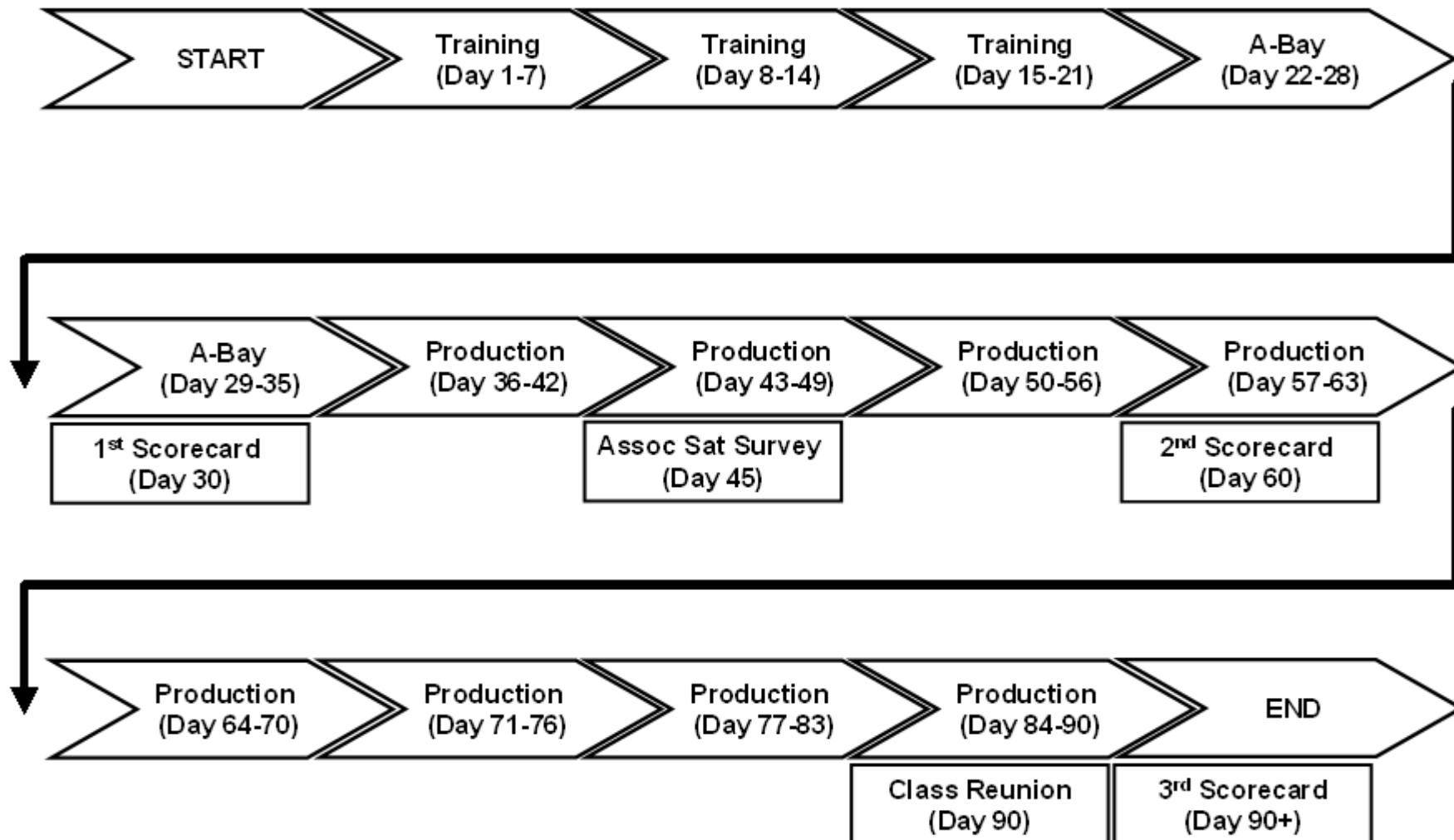


On Boarding Excellence

CheckFree®

is now part of **FISERV**

Process Timeline



On Boarding Excellence

CheckFree®

is now part of 

- Scorecard composed of four primary components:
 - **Current Snapshot** – consolidates the primary metrics of each class into a single view. These metrics measure the “health” of each class and, collectively, of the On Boarding Excellence process as a whole.
 - The primary metrics are organized into three categories: Key Performance, Process Completion, and Process Effectiveness metrics.
 - Each category is composed of multiple metrics which measure the four tracks of the On Boarding Excellence process.
 - **Status Summary** – consolidates the status of each class categorized by site. This summarizes each class into **GREEN** or **RED** status based on the primary metrics.
 - **Class Detail** – consolidates a trended view of the primary metrics for each class. This provides insight into whether the class is “heading in the right direction”. The On Boarding Excellence scorecard will have a class detail for each class “in flight”.
 - **Strategy Evolution Log** – consolidates all strategy evolution initiatives into following categories: Financial, Customer, Internal Capabilities, and Learning and Growth.
- Scorecard reviewed approximately every thirty (30) days in the On Boarding process.

On Boarding Excellence

CheckFree®

is now part of **FISERV**

Aug-08		Key Performance Indicators				Goal		Process		Voice of the Associate						
Class		Efficiency		Quality		Attrition	Recruit Grad	Train Assess	ABay	Reten	Sat w/ Trainer	HR	Training Prep	ABay	Reten	Mentor
Phones		Gen	BOA	E-Sat	I-Sat	%	%	%	%	%	A-Sat	A-Sat	A-Sat	A-Sat	A-Sat	A-Sat
Target		90- 437	90 - 609	78	80	0%	100%	85.0%	95%	95%	4.25	4.25	4.25	4.25	4.25	4.25
Aurora 4.14.08	90 days	521	537	90.8	83	50%	100%	93.7%	100%	99.7%	4.85	4.57	4.00	4.71	4.71	5.00
Phoenix 4.14.08	90 days	345	387	83.4	81	0%	70%	96.4%	100%	99.2%	4.76	4.71	4.14	4.86	4.71	4.86
Aurora 5.19.08	60 days	516	532	79.9	73	36%	90%	92.2%	100%	99.8%	4.81	4.71	3.86	4.43	4.86	4.86
Dublin 5.19.08	60 days	373	445	66.2	78	14%	140%	92.1%	100%	99.5%	4.79	5.00	4.67	5.00	4.50	4.67
Phoenix 5.19.08	60 days	428	502	73.8	83	0%	90%	94.0%	100%	99.5%	4.85	4.67	4.44	4.44	4.28	4.67
Aurora 8.18.08	ABay					0%		91.0%		99.7%	4.65					
Phoenix 8.18.08	ABay					0%		92.2%		100%	4.90					
		60- 475	60 - 661													

CLASS DETAIL

Class Aurora 5.19.08
 Channel Phones
 Current Week 23

Aug-07			Trended Data		
Categ	Metric	Target	30	60	90
KEY PERFORMANCE INDICATORS	GENS	475	573	516	
	BOA	661	592	532	
	E-SAT	78	85.8	79.9	
	I-SAT	80	66	73	
	ATTRIT	0%	27%	36%	

CLASS DETAIL

Class Phoenix 5.19.08
 Channel Phones
 Current Week 23

Aug-08			Trended Data		
Categ	Metric	Target	30	60	90
KEY PERFORMANCE INDICATORS	GENS	475	522	428	
	BOA	661	582	502	
	E-SAT	78	78.1	73.8	
	I-SAT	80	86	83	
	ATTRIT	0%	0%	0%	

OnBoarding Excellence

Launch Quarter is comprised of eight classes hired in June – September 2007. Their cumulative results are compared to the thirteen inbound classes hired from October 07 – March 08.

AHT

Genesis		
30 days	60 days	90 days
3 secs	10 secs	26 secs
0.52%	2.07%	6.06%

BOA		
30 days	60 days	90 days
46 secs	34 secs	58 secs
6.98%	6.11%	10.88%

AHT Performance improved over goal each month during ramp-up period.

Associates take more BOA calls; BOA's 11% improvement has more impact than the improvement in Genesis.

Sat w/ Sup

Group	Average
Launch	4.39
Post	4.57
Increase	0.18
% Increase	4.10%

Associates completed a survey 45 days after their hire date. They rated satisfaction with the relationship with their Supervisor on a scale of 1-5, with a goal of 4.25.

Eighty-four associates completed surveys in the Launch group. The average score of 158 post-launch surveys increased by more than 4%.

Attrition

Group	Rate
Launch	23.53%
Post	18.96%
Decrease	4.57%

The percentage of associates leaving the company fell by more than 4.5%.

This measurement is at the 3 month mark after associates started production.

Performance improved in three key metrics when comparing results for associates hired after the Launch period. The Track leaders made efforts to improve AHT, decrease attrition, and increase the satisfaction of associates with the efforts of and relationship with their Supervisor.