

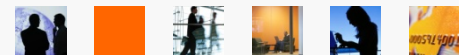
## Are You Doing Your BEST??

December 7, 2009

Debbie Gable, Lin Hillis, Michele Shuey, Mary McGhee,  
David Potts and Jan Huskey

# Welcome to ASTD's Atlanta Chapter Meeting

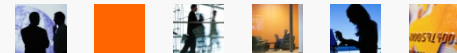
- Thank you to Dr. Sue Lind and other ASTD leaders for asking Fiserv to host this meeting
- Winning the ASTD BEST award had been a tradition within CheckFree since 2005. CheckFree was acquired in December 2007 by Fiserv
- I attended the 2005 BEST awards ceremony in Washington DC, with Lin Hillis, VP Training and Organizational Development. It was a honor to be among other BEST winners
- The Training and Organizational Development team is partnering with other Fiserv colleagues to build an enterprise-wide learning and development function
- Commitment for training and development from the executive level has been the key success factor for us. Our leaders have demonstrated their commitment by:
  - Teaching sessions in a week long leadership development program for senior leaders
  - Leading the Talent Management process on a yearly basis
  - Making training and development a strategic goal
  - Making leadership training mandatory around key initiatives such as people management and change management
- The Training and Organizational Development team is partnering with other Fiserv colleagues to build an enterprise-wide learning and development function. We look forward to applying for the BEST award as Fiserv in the coming years



# How to be recognized as the BEST



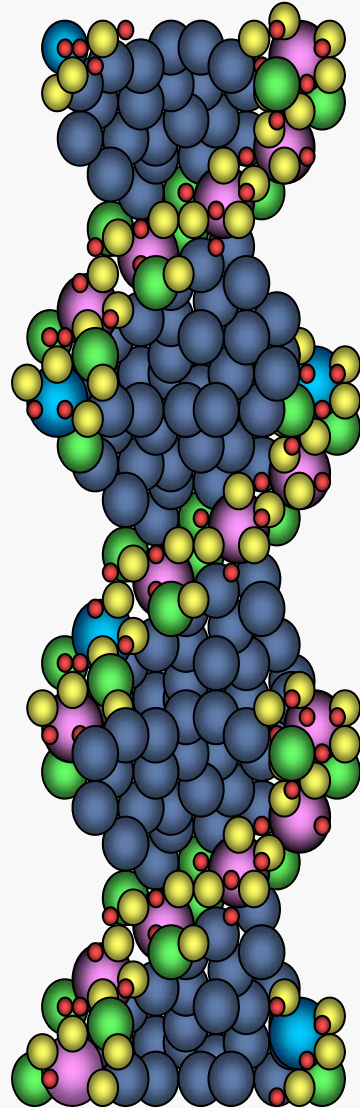
The ASTD BEST Award recognizes organizations that have **an integrated learning function** that is **strategic to the business** and demonstrates **enterprise-wide success** as a result of employee learning and development



# Four elements that must be in an organization's learning and development DNA

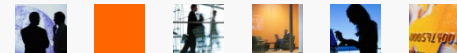
Best Talent

Support  
Progressive  
Learning



Enterprise wide

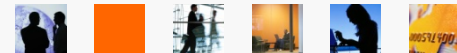
Through learning  
culture



**fiserv.**

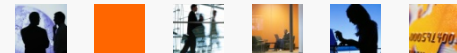
# BEST award criteria

- Learning has an enterprise-wide role: involving the executive team, creating solutions to business issues, and setting organizational strategy
- Learning has value in the organization's culture: learning opportunities for employees, C-level involvement, learning for growth of the organization, and innovation
- Learning links to individual and organizational performance: alignment with the business, efficiency, measurement of the effectiveness of learning, and success with non-training solutions for business needs
- Investment is made in learning and performance initiatives
- Provide metrics and evidence of strong links between learning activities and business results that are strategically important to the company
- Have an integrated learning function that is enterprise-wide
- Are innovative. Successful entries use practices that are innovative in the profession, not just in their particular companies. E.g. using an LMS may be innovative in a company but is now commonplace in the larger workplace
- Show learning's relevance to organizational goals



# About Fiserv

- Fiserv, Inc. (NASDAQ: FISV) is the leading global provider of information management and electronic commerce systems for the financial services industry, driving innovation that transforms experiences for financial institutions and their customers
- Fiserv serves more than 16,000 clients worldwide, including financial institutions of all sizes, and businesses in a wide range of industries, including telecommunications, energy, retail, and health and fitness
- Today, Fiserv's integrated platform focus spans five key areas of competence: Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Business Intelligence & Optimization
- Fiserv employs approximately 20,000 people around the world
- CheckFree was the Fiserv company that received the BEST recognition from 2005-2008
- CheckFree was acquired by Fiserv in December 2007



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# Fiserv 2.0: A Strategic Framework



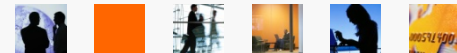
## VISION

“A global leader in transaction-based  
technology solutions”

“To provide integrated technology and  
services solutions that enable best-in-class  
results for our clients”



## MISSION



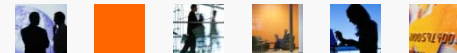
**fiserv.**

# Fiserv's organizational structure

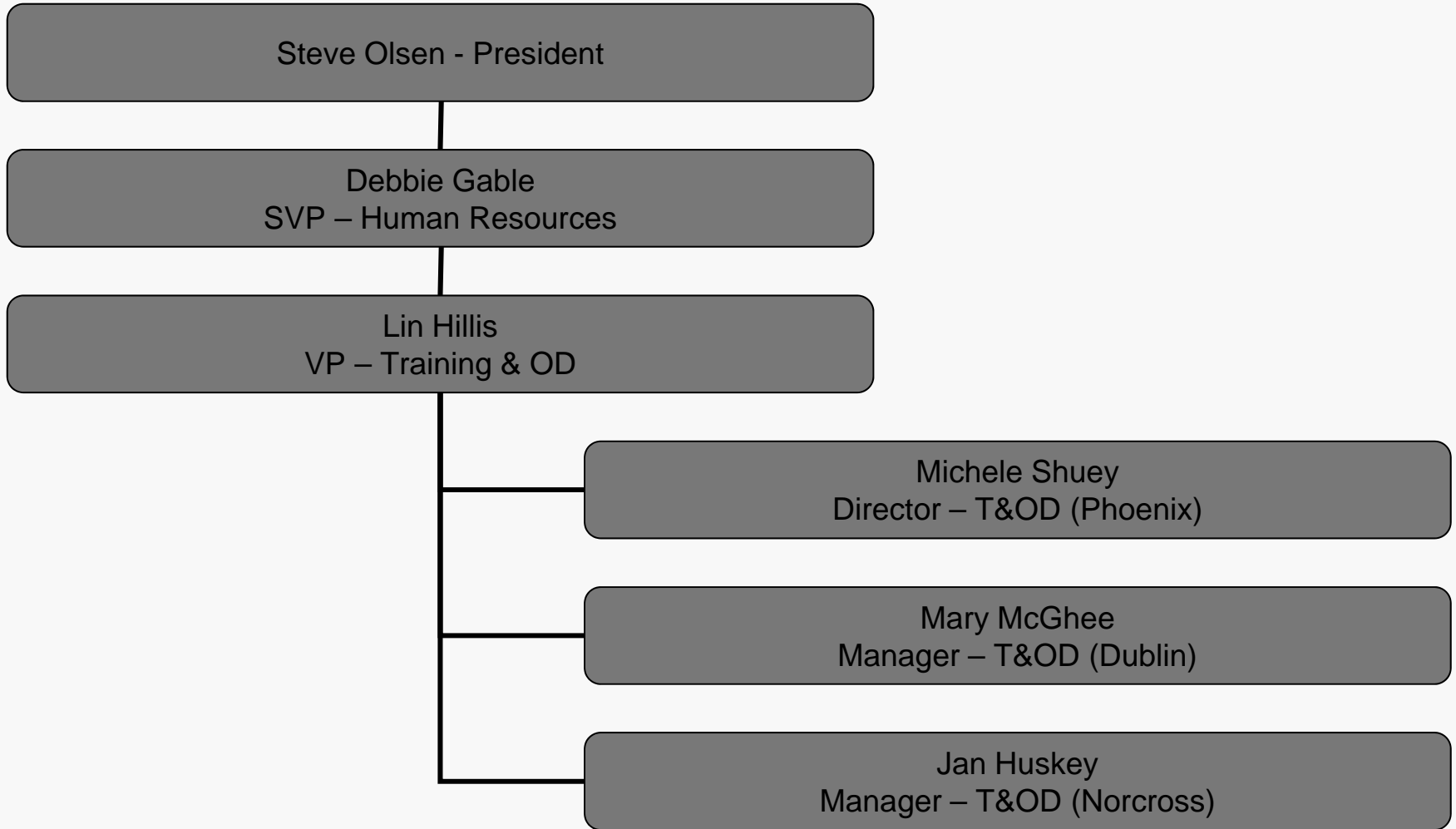
**The Depository Institution Services (DIS) Group provides a market-leading set of solutions servicing the financial industry. From account processing and online banking to document and biller services, our mission is to help our customers solve their problems.**

**The Financial Institution Services (FIS) Group provides solutions that enhance a Financial Institution's accounting processes-or provides stand-alone best practices-now have the scale to serve the full range of the industry-credit unions to large banks**

**Fiserv Enterprise Technology Group Supports the business units by offering technology consulting, business application integration, data center hosting, network optimization and infrastructure support**

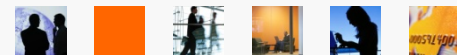
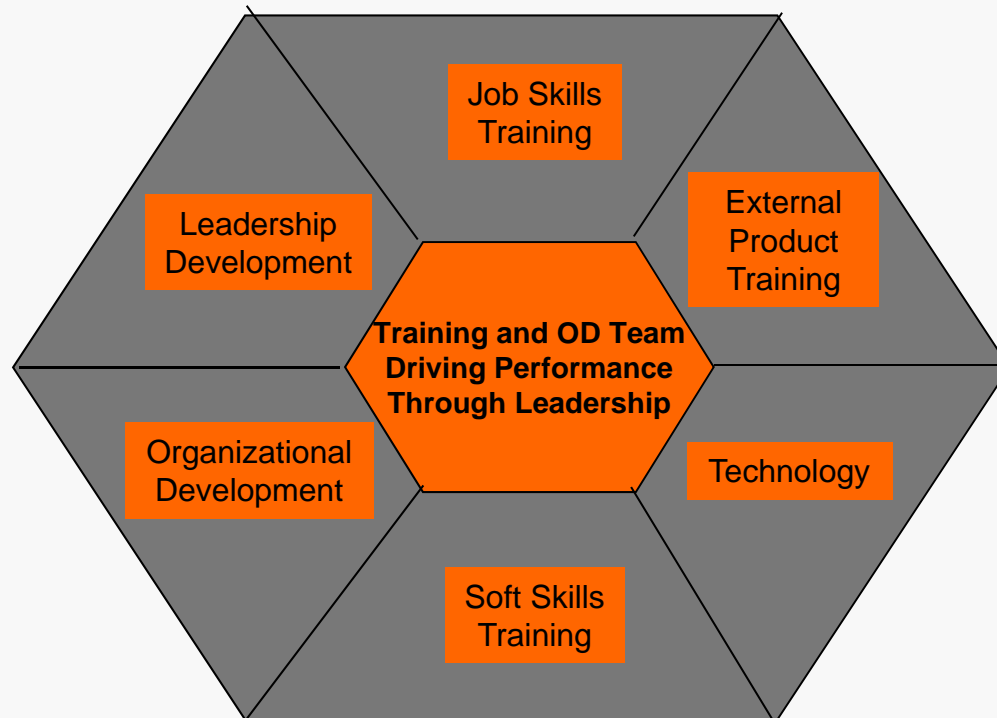


# Depository Institution Services Group



# DIS Training and OD Team

The Training and Organizational Development team provides performance and development solutions that align with the organization's strategic vision to include: Training, Coaching, Development and Succession Planning, Diagnostic Tools, Performance Partnering, Teambuilding, Change Management for all associates and various external clients to develop individual and organizational potential



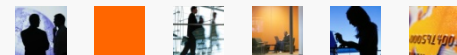
# Impact of culture on being the BEST

## As an organization

- A Commitment and Achievement based culture
- We reward results, our work groups are self-directed
- We are energized by identifying problems and developing focus
- Once committed we do everything that is needed to get the job done
- Work done through relationships
- Culture of quality-phenomenal work ethic
- These cultural factors helped drive the success of the organization as to BEST practices

## Training and Organizational Development group

- Roots as a call center training group
- Gave us the skill sets to be able to lead large corporate change management initiatives
- Paired these skill sets with organizational development skill sets
- These skills gave us the ability to build a learning function that was integrated into the enterprise and helped us to meet the criteria of the BEST award



# Winning the Best

## 2005

Implemented a peer **mentoring and network** program. Participants included Director level and above. Complete self assessment and then matched to a peer network based on complementary and development opportunities across various geographic locations. Developed a kit of learning tools.

Leadership  
 Development

## 2006

Created a **supervisor academy** to train individuals to become leaders in the company's call centers.

Leadership  
 Development

## 2007

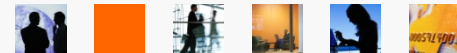
Partnered with human resources to **develop a five-course people management curriculum**. A blend of classroom instruction and e-learning, the mandatory program teaches managers skills for setting expectations, handling conduct situations, and adopting behavioral-based interviewing

Org.Development

## 2008

Created an **On Boarding Excellence scorecard** that measures efficiency, quality and attrition, process completion and associate satisfaction during all phases of On Boarding

Job Skills Training



# BEST Highlights - People Management from 2007 award

## Situation

- Did not have enterprise wide people management training
- Had five divisions – had not leveraged this type of training across divisions

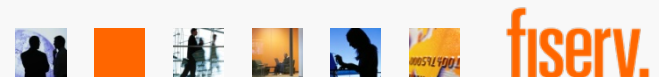
## Actions

- Partnered with HR to create a curriculum of 5 people management courses
- Courses consisted of a blend of classroom instruction and e-learning
- Managers enterprise wide were taught skills for setting goals and writing performance reviews, handling conduct situations, and adopting behavioral-based interviewing
- To ensure attendance in these classes, T&OD developed communications for HR Business Managers to use to discuss in their customers' weekly meetings so that we could have top-down commitment in attending the courses
- T&OD led the instruction of these courses and the HR Managers attended as SMEs.

## Results

- Courses were mandatory for all leaders-over 600 managers attended courses over a year and half

## How match against BEST criteria?



# BEST Highlights – On Boarding from 2008 award

## Situation

- In order to overcome the challenge of aligning learning objectives with business goals and metrics, we implemented an On Boarding Excellence Scorecard for new hires within our call centers in June 2007

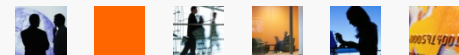
## Action

- Developed the scorecard as a partnership between the business client, training and human resources
- It was designed to measure key performance indicators such as efficiency, quality and attrition; process completion and associate satisfaction during all phases of the On Boarding process
- Learning and performance initiatives were selected and designed based on divisional training needs analysis, employee development plans and talent management

## Results

- Satisfaction rating around being prepared to do their jobs increased from 3.97 , the previous year, to 4.46, on a scale of 5
- Within 6 months average handle time decreased by 40%
- The scorecard has enabled the training function to gain real-time insight into associate satisfaction and training preparation for production in the context of business goals
- It has allowed training to see the correlation or lack of correlation between training process improvements and associate satisfaction and actual performance
- It has created a shared accountability within the business, training and human resources groups for the success of all new hire associates

## How match to BEST criteria?



# How has winning the BEST made us the BEST?

- We track our accomplishments throughout the year using the ASTD criteria
- Is a motivator for the Training and Organizational Development group
- Importance of metrics
- Establishing best practices

## For the future

- Fiserv has been open to integrating many of the best practices within the organization as a whole
- We look forward to applying for the BEST award as Fiserv in years to come

