MANAGING A DIGITAL REVOLUTION IN FINANCIAL SERVICES
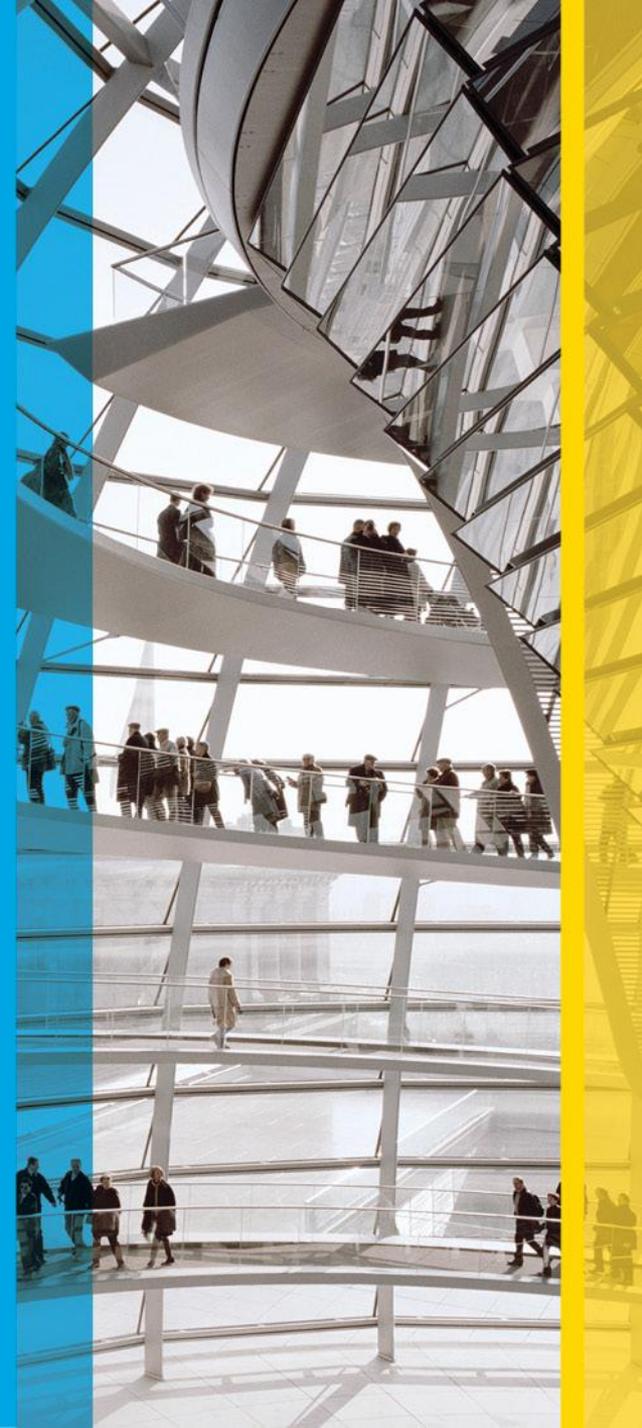
PMI FINANCIAL SERVICES GROUP

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DIGITAL WORKPLACE
IMPROVING THE EMPLOYEE EXPERIENCE WITH TECHNOLOGY

PROGRAM SUMMARY

MISSION

Provide our worldwide employees the technology solutions necessary to be productive, knowledgeable and engaged helping them to deliver exceptional service to our clients and partners

OUR GOALS

- Assess the current and future needs of our employees and develop a comprehensive road map that addresses those needs
- Eliminate any employee inefficiencies by measuring the user experience and designing for ease of use
- Promote existing capabilities through targeted communication and prescriptive guidance methods to ensure all employees experience the full value of our solutions

Information Security Identification: Confidential

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WHAT IS THE DIGITAL WORKPLACE?

Interpersonal Communication

- Email
- Instant Messaging
- Micro Blogging
- Blogs
- Alerts & Messaging
- Hard/Soft Phones
- Web, Video, Audio Conferencing
- Voice Mail

Productivity

- Desktop
- Virtual Desktop
- Mobile Devices
- Productivity Software
- File Repositories
- Printers/Faxes
- Translation Tools
- User Defined Technology
- Search

Collaboration

- Team Sites
- Communities
- Wikis
- Conference Room Solutions
  - Video Conference
  - Smart Boards
  - Speaker Phones

Information Communication

- Intranet sites
- Portals
- Personalized Homepages
- User Feedback
- Town Halls
- Offline Presentations
- Knowledge Management

Applications – (Sample List)

- Compensation
- Performance
- Learning & Development
- Benefits
- Finance
- Procurement
- Manager Tools
- Travel & Expense
- Access Management
- Compliance & Audit
- Help Desk
- Many more…

Crowd Sourcing

- Idea/Innovation Management
- Polling
- Surveys
- Forums

Employee Networking

- Employee Directory
- Organization Charts
- Rich Profile
- Find an Expert

Mobility

- PC/Laptop/Tablet/Smartphones
- Corporate/BYOD
- App Store
- Remote Access
- Wireless Access
- Disaster Recover Management

Client Experience Management

- Usage Metrics
- Web Analytics
- Adoption
- Client Satisfaction
- Productivity Measure

Over 50+ Applications   **Over 85 Programs Involved**

We have invested in a large number of tools that allow our employees to be productive and provide exceptional service to our clients and business partners

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BENEFITS OF A SUCCESSFUL DIGITAL WORKPLACE

ORGANIZATIONAL BENEFITS

- Our holistic view across all employee solutions allows the organization to make more informed decisions on where to make future investments that give our employees the largest benefit
- Top industry talent expect a high quality digital workplace. We strive to offer a work environment that employees that is competitive with any organization in any vertical allowing us to compete for the best talent

EMPLOYEE BENEFITS

- Employees expect high quality, consumer grade experiences that they witness in their personal lives. We're dedicated to delivering engaging experiences
- Easy to use solutions that enable employees to be more productive, to find what they need when they need it and to feel part of a greater community

CLIENT BENEFITS

- Increasing the efficiency of our employees allows each individual more time to focus on providing exceptional client service
- Efficient, satisfied, & engaged employees typically reduce turnover which leads to retained client knowledge
- Our digital solutions allow employees opportunities to always be connected, in or out of the of the office or any location around the globe enabling them to solve business challenges anywhere or at any time

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DIGITAL WORKPLACE APPROACH
EMPOWER COMMUNITY, DEFINE ROADMAP, MEASURE SUCCESS

User Experiences

User Needs to Guide Strategy
- Communicate user maps to understand our employee patterns / requirements
- Utilize personas to represent user needs

Service Offering

Service Based Approach
- Establish service ownership, accountability and measurement
- Expand service catalog to improve best of breed tool set
- Rationalize existing tools to improve overall service levels

Team Collaboration

Digital Workplace Team Community
- Identified working group to represent service catalog
- Collaborate across teams to support multiple user experiences
- Crowd source ideas and solutions

Measure Success / Communicate

Execute Our Strategy
- Monitor and measure our progress through defined KPIs
- Establish baseline metrics and targets for each service level; establish scorecards
- Plan defined to increase awareness and communicate progress

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CHALLENGES
ANTICIPATE, ARTICULATE, NAVIGATE

Key Challenges	Remediation Tactics
Program of program, large scale	Break into pieces, identify owners, establish governance
Culture is not collaborative, silos, territorial	Visible, fact-based communications All files in central repository Focus on the positive, build trust
Financial Services specific considerations	Visible partnership with Information Risk teams, question the status quo
Employee engagement	Extensive communications plan to share information in a variety of way, extensive employee engagement plan
Cultural shift needed	Simplify solutions, provide easy, intuitive interfaces

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PROGRESS DESPITE CHALLENGES

ACCOMPLISHMENTS

- Established team, program governance, cadence and roadmaps
- Established comprehensive communications plan
- Established employee outreach plan, generating excellent feedback
- Teams executing against goals to deliver user experience improvements

WHAT'S NEXT?

- Continued focus on cultural shift:
  - ✓ Collaboration – pictures, video chats, etc.
  - ✓ Enterprise Social – collaborate outside of email, more open approach
  - ✓ Cross team collaboration – moving beyond the organization structure

- Continued focus on communicating the value of the tools available
  - ✓ Webinars
  - ✓ Champion network
  - ✓ Communications via many different delivery mechanisms

- Continued execution of improvement roadmaps

Our Digital Revolution has begun!

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Q & A