knowledge17

WORK at LIGHTSPEED

Driving HR Operations and Employee Relations efficiency at Discover

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Discover Financial Services

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Discover Financial Services

The opinions expressed in this presentation are those of the presenters, in their individual capacities, and not necessarily those of Discover.

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Agenda

- Introductions
- Objectives
- Service Delivery at Discover
- Goals and Objectives
- Implementation Approach
- Outcomes
- Lessons Learned

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Speaker Introduction



Name: Paul Kolenda

Title: Sr. Manager Human Resources Operations

Function: Human Resources

Company: Discover Financial Services

Experience: 3 years leading HR Operations at Discover, 20 years HR transformation, strategy and operations consulting

Expertise: Global HR Service Delivery, HR Transformation, HR Systems, Change Management

Achievements: Established the HR Operations team at Discover, Designed and implemented multiple shared services departments for Fortune 500 companies

Current Projects: Transforming manager self-service, Expanding the services offered by HR Operations and exploring the use of Robotic Automation for HR service delivery

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Speaker Introduction



Name: Kyle Mastio

Title: Sr. Manager, IT Service Management

Function: ServiceNow Platform Owner

Company: Discover Financial Services

Experience: 8 years in IT, 4 years with ServiceNow

Expertise: IT Service Management, ITIL Certified

Achievements: Deployed and manage the ServiceNow platform across the enterprise: IT, Consumer Banking, HR, Risk, Payment Services.

Current Projects: Customer Service Management, Enterprise Service Portal

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My Company



Name: Discover Financial Services

Industry: Financial Services

Market Focus: To help people spend smarter, manage debt better and save more so they achieve a brighter financial future.

Company's Primary Products/solutions:

- Banking: credit cards, student loans, personal loans, home equity loans, checking and savings accounts, certificates of deposit and money market accounts
- Payments: PULSE, Diner Club International, Discover Network

Human Resources - Initiatives

- **Time** → Maximize workforce productivity and make HR easy and efficient
- **Talent** → Develop and deliver great people
- **Energy** → Foster a strong culture with high engagement

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Objectives and What You Will Learn

Objectives

- Demonstrate how Discover was able to rapidly implement ServiceNow and establish it as the backbone for HR Operations transactions and Employee Relations tracking and reporting

What you will learn

- Understand the challenges and goals of Discover Human Resources
- Learn how HR was able to implement an HR solution on an established enterprise platform in a short timeframe
- How Discover HR has taken a long-term view of ServiceNow and plans to expand its use
- The benefits Discover has achieve as a result of using ServiceNow
- How Discover uses data obtained from ServiceNow to drive processes and planning

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ServiceNow Deployment at Discover

In Production

- Incident
- Change
- Problem
- Knowledge
- Request/Catalog
- Asset
- Configuration (CMDB)
- SDLC/Agile (Internal)
- Discovery / ServiceWatch
- CreateNow (FIU, Bank, Risk)
- Employee Self Service Portal
- Service Desk Chat
- Visual Taksboards
- HR Case Management



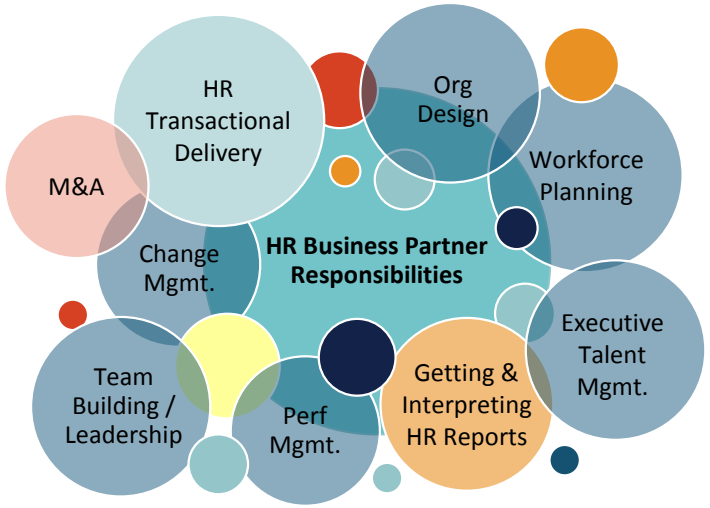
Planned

- Security Incident Response
- Vulnerability Management
- Application Portfolio Management
- Customer Service Management
- Orchestation
- Event Management
- Performance Analytics
- HR Service Automation
- Implement Jakarta

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Previous Situation at Discover – Human Resources

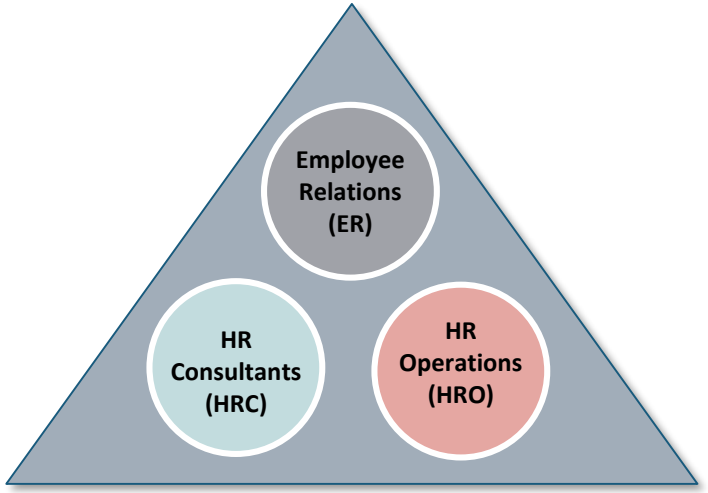
Current



Transform Human Resources

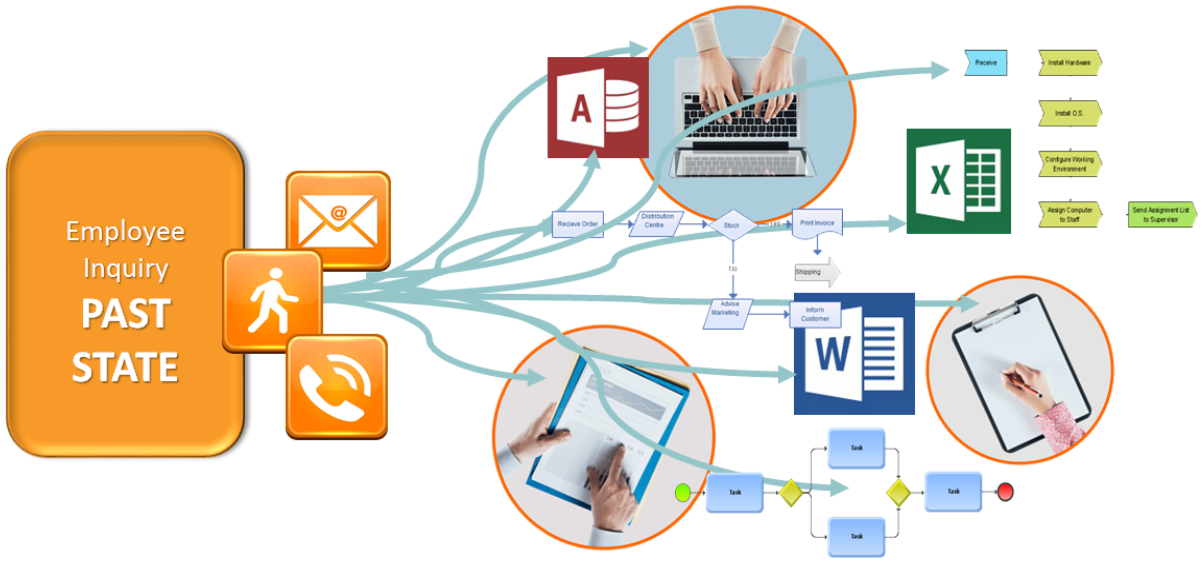
1. People
2. Process
3. Organization
4. Technology

Future



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Previous Experience - Complicated

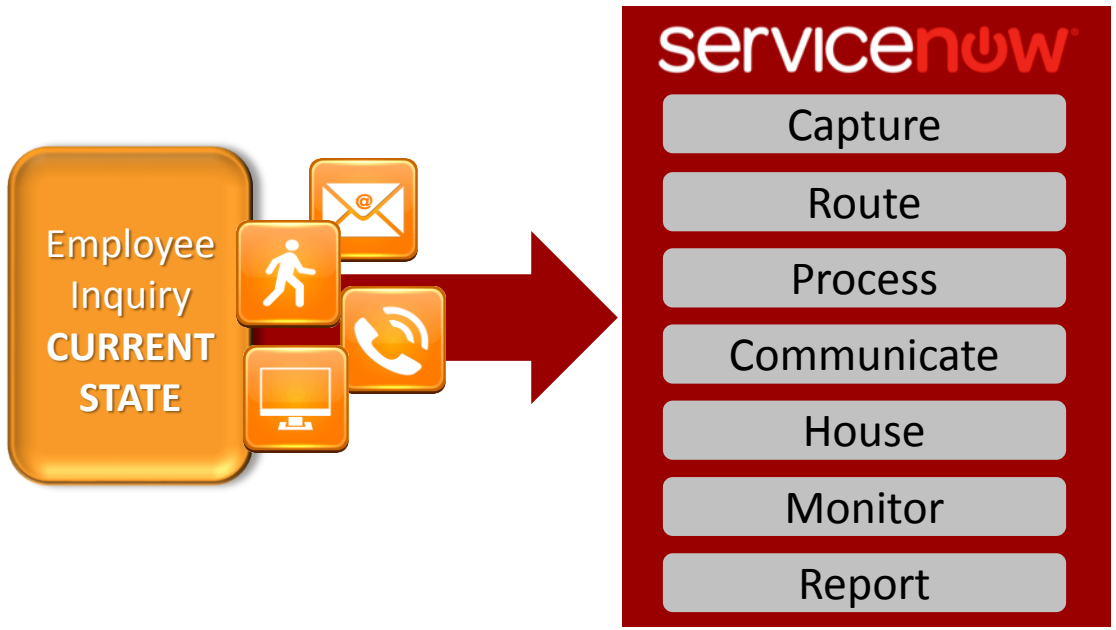


- HRIS: Workday
- ER Tracking: ***Homegrown***, unsupported, and stand alone application and ***PAPER***
- Case Management: ***Outlook***
- Organization: Outsourced call center, decentralized and reporting regionally
- Processes: Disparate by location, largely undocumented
- Non-Workday Data: Limited, fragmented, inconsistent and difficult to obtain

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Solution at a Glance

Deliver a “cardmember-like” service to our team members at Discover



- To help people spend smarter, manage debt better and save more so they achieve a brighter financial future
- Recognized for high customer service
- We Treat You Like You’d Treat You
- Best Place to Work for LGBT Equality*
- Computer World’s 100 Best Places to Work in IT
- **Awesomesauce**

*Human Rights Campaign’s Corporate Equality Index

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Objectives of the ServiceNow Implementation

1

Process Consistency

- Greater clarity, simplicity and consistency of core HR processes
- Increase speed-to-resolution and transaction accuracy
- Increase the coordination across various HR functions to deliver services
- Efficient and intuitive system user experience

2

Enhanced Compliance

- Reduced risks through standardization of process and consistent documentation

3

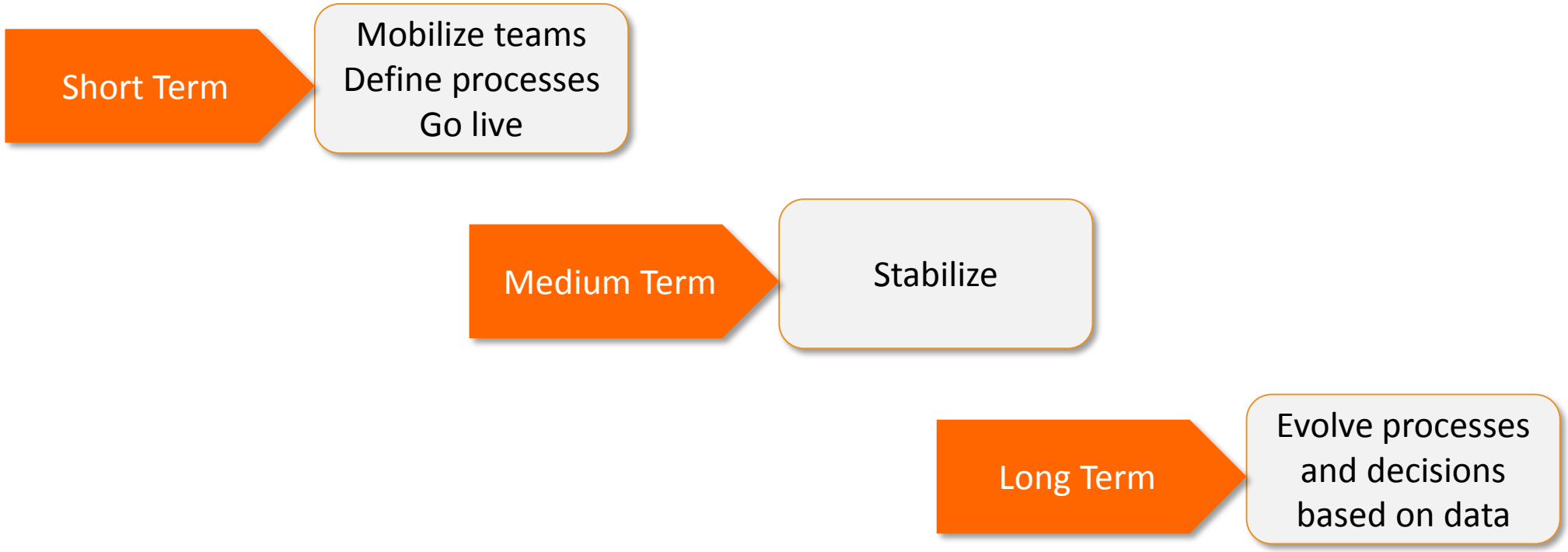
Quality Data

- Quality data from centralized tracking
- Measurable performance indicators (KPIs & SLAs) to optimize performance
- Analytics to support operations and decision making

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Realistic Goals and Timeframe

The overarching Transformation had clear objectives that guided the ServiceNow implementation



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HR Operations - Goals

Short Term	Medium Term	Long Term
Simplify and Standardize	**Measure and Improve**	**Analyze and Automate**
• Replace email as a means of interaction • Centralize and streamline requests • Document transaction requests • Improve demand management • Load balancing • Back office tool	• Measuring analyst performance • Facilitate SLAs • Process insight through Score cards and dashboards • Quality assurance • Templates, routing and automation • Service catalog for specific requests – employee facing	• Provide greater insight into transactions • Integrate with Workday • Facilitate Process Automation

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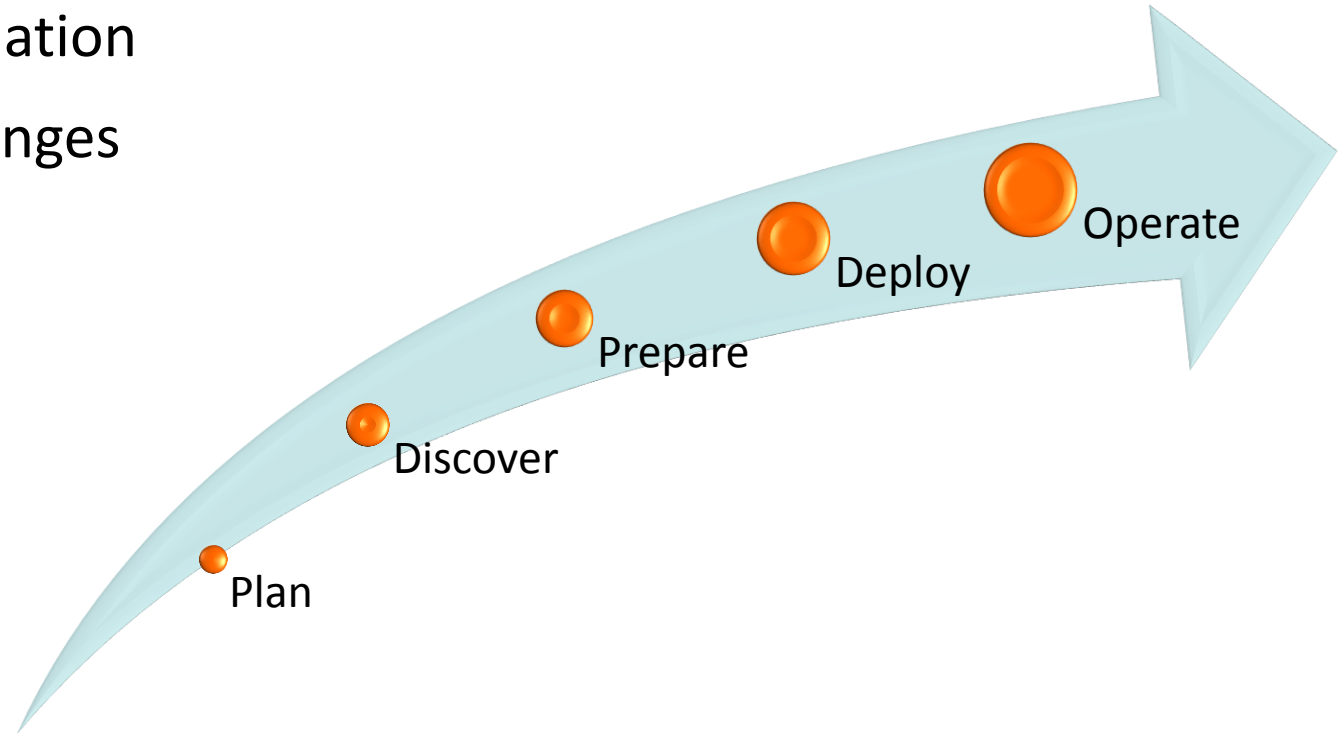
Employee Relations - Goals

Short Term	Medium Term	Long Term
Manage and Track • Track and manage interactions • Manage Reasonable Accommodations • Support compliance requirements • Gain an understanding of ER issues by location	**Analyze and React** • Analyze data and identify trends • Identify opportunities for targeted interventions • Create a comprehensive view of employee interactions	**Facilitate Change** • Advanced analytics integrated with other HR systems (Workday, Leave, Performance, Compensation) • Use data to plan and execute specific programs to improve the organization

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Implementation Approach

- Teams
- Timeframe
- Foundation
- Challenges



LIVE

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Team Structure

Service Now (Vendor)

Relationship Owners:
- Partner
- Partner
- Partner

Engagement Manager:
- Manager

Technology Consultant:
- Consultant

Bus. Process Consultant:
- Consultant

HR Technology (HRT)

- Team Lead
- Process Expert

Business Tech (BT)

Relationship Lead:
- Team Lead

Technology Consultant:
- Consultant
- Consultant
- Consultant

Employee Relations (ER)

- Sponsor
- Team Lead
- Change Leader
- Process Expert
- Process Expert

HR PMO

- PMO Leader

HR Consulting (HRC)

- Change Leader
- Process Expert

HR Operations (HRO)

- Sponsor
- Team Lead
- Change Leader
- Process Expert
- Process Expert

Employment Law (EL)

- Sponsor
- Process Expert
- Process Expert

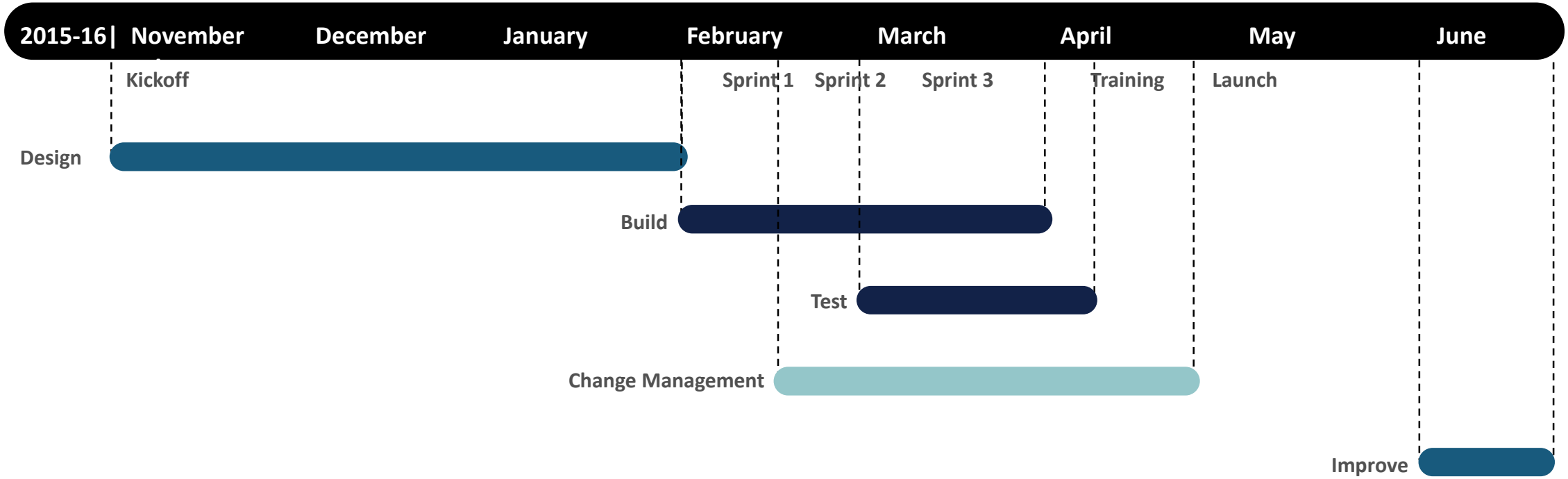
Red highlights people flagged as “HR system admins”

Key Takeaway

- Cross functional team
- Senior level sponsors
- Clear and documented roles and responsibilities
- Knowledge experts
- Influential representatives
- Change management incorporated from the start

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Solution – Timeline



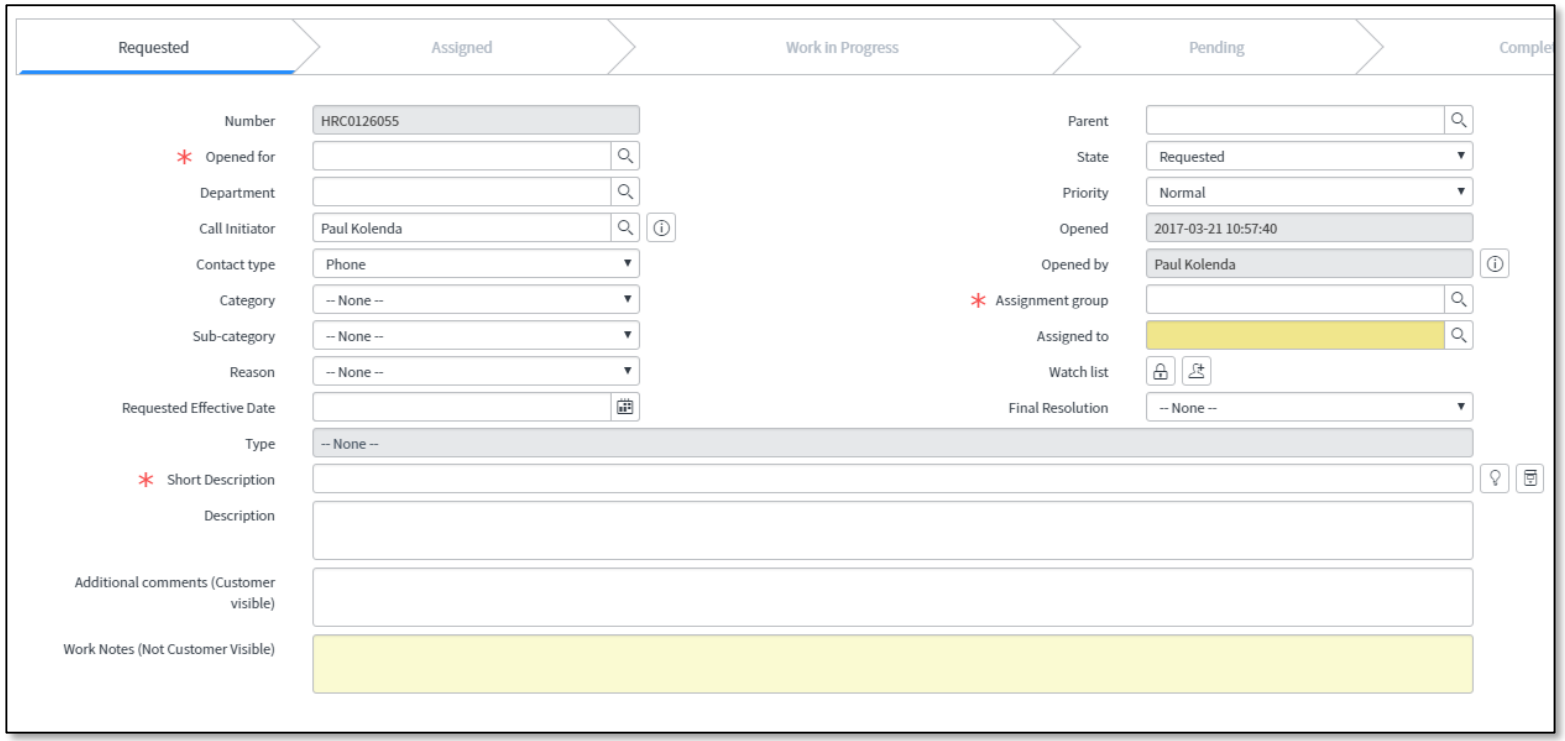
Key Takeaway

We view ServiceNow as an evolving solution that will grow and mature with our team.

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Foundation

- Get the basics in for go-live
- Build a strong foundation
- Expand in increments



Key Takeaways

- Limit the number of required fields to speed data entry
- Only use specific fields for items you need to report on
- Keep It Simple Stupid!

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Challenges

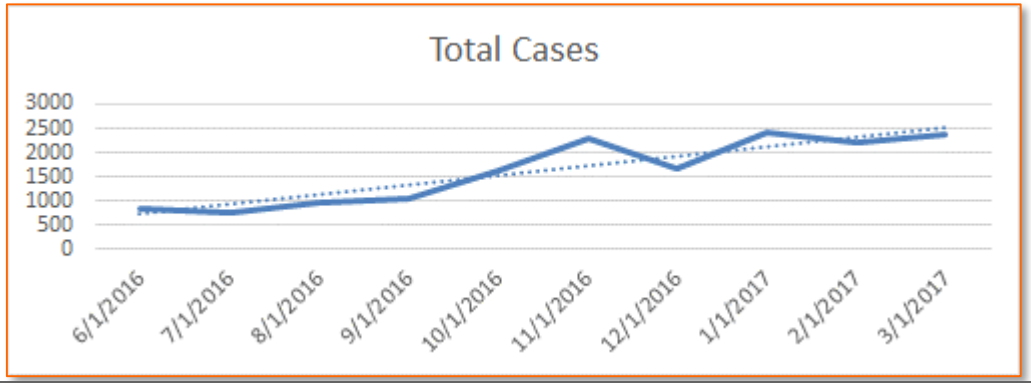
- Timeframe
- Keeping it simple
- Competition for resources
- Change management
- Training preparation and delivery
- Introduction to Agile Methodology vs traditional approach



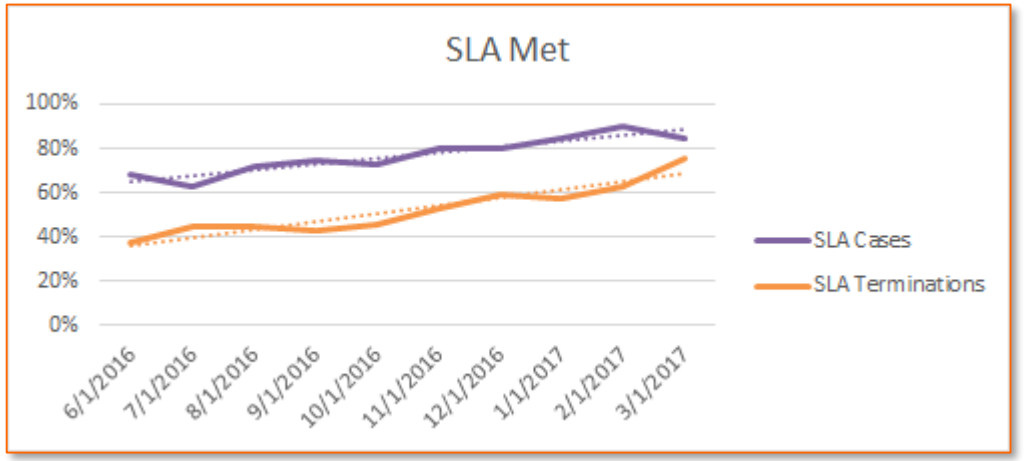
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Achievements – HR Operations

- All interactions goes through ServiceNow
- Operational metrics are driving our organization design and headcount
- Real-time load balancing (efficiency)
- ServiceNow cases is used to monitor customer service and quality
- Future workflow and automation will be fund the intake of additional processes
- Teams are asking to go on ServiceNow



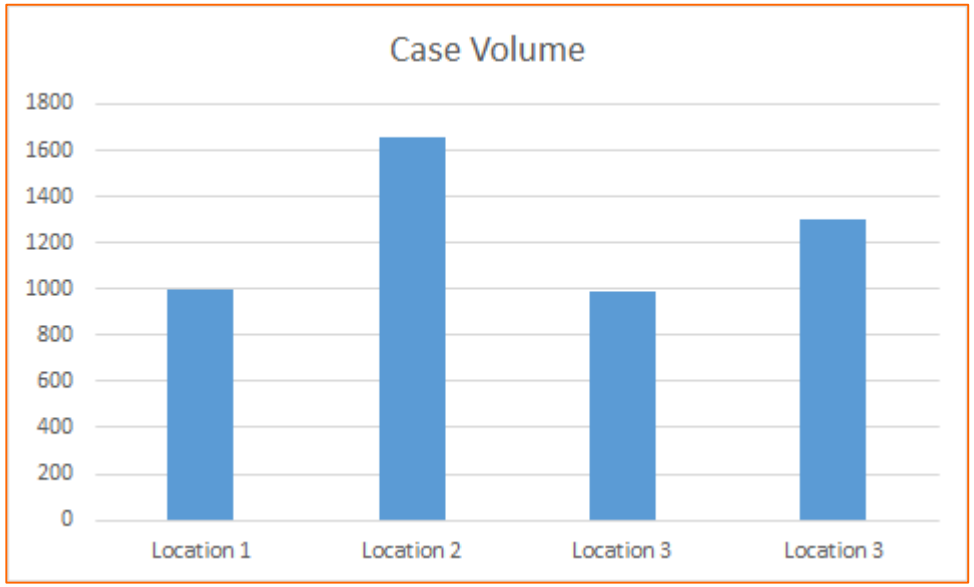
SAMPLE DATA FOR ILLUSTRATIVE PURPOSES ONLY



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Achievements – Employee Relations

- Transparency drives consistency
- Single view of all employee interaction
- Automation of Reasonable Accommodations
- Identifying trends and issues with real data
- SLAs on complaints leading to escalation
- Flagging issues related to specific locations and businesses – driving interventions
- Next step - integrate ServiceNow data with other systems



SAMPLE DATA FOR ILLUSTRATIVE PURPOSES ONLY

	Location 1	Location 2	Location 3	Location 4
Accommodation Management				
Facilities/Office Equipment	3	3	4	7
General Ergonomic Assessment	2	4	6	8
Other	7	1	32	4
Schedule	8	4	2	4
Conduct Issue				
Compliance Defects	14	55	45	8
General	23	38	1	32
Misuse of Company Corporate Card	1	6	7	2
Reliability	65	22	38	40
Timekeeping Compliance	4	45	5	35

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Our Next Steps

- Evolve request management
- Continue to expand within Human Resources
  - Training
  - Vendor Management
  - Immigration
  - Reporting requests and tracking
- Expand the use of SLAs
- Continue to mine data to identify additional opportunities



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Lessons Learned

- Keep it simple
- Train the team on the implementation approach
- Develop a governance approach for decisions and management
- Change management is critical
- Training is crucial for day one and ongoing operations
- Have a long-term vision and a plan to work towards

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Top Takeaways

1

Clear Objectives

- Short and long term
- Documented

2

Project Management

- Organization
- Goals
- Roles & Responsibilities

3

Change Management

- Training
- Documentation
- Communications
- Follow-up
- Ongoing

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Thank You

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Q & A

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