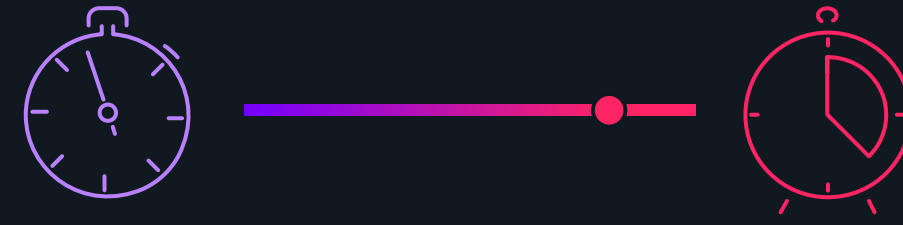


Fiserv Banks on Improved Efficiency and Clarity with NICE Employee Engagement Manager

After a substantial merger, Fiserv had a complex workforce split across two workforce management solutions, both of which needed improvement. The company standardized on NICE Workforce Management with Employee Engagement Manager, significantly improving the efficient allocation of overtime, reducing manual labor for employees and analysts alike, and boosting visibility and communication between agents and managers.



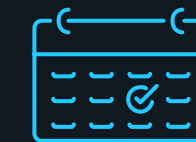
SAVING 15 HOURS PER MONTH ON MANUAL OVERTIME APPROVALS



REDUCTION OF UNNECESSARY OVERTIME



IMPROVED REMOTE ACCESS TO SCHEDULES AND SELF-SERVICE TOOLS



IMPROVED VISIBILITY OF AVAILABLE AND APPROVED OVERTIME PERIODS



CUSTOMER PROFILE

ABOUT	Founded in 1984, Fiserv provides payment and financial services to institutions worldwide, including digital banking, account processing, card issuance, payments, and point-of-sale systems.
INDUSTRY	Financial services
WEBSITE	www.fiserv.com
LOCATION	Headquartered in Brookfield, WI
AGENTS	3000+ agents, 30 WFM analysts
GOALS	<ul style="list-style-type: none"> • Post-merger reconciliation of workforce management practices • Improve efficiency and accuracy of overtime scheduling • Improve agent scheduling self-service • Reduce manual tasks for WFM analysts
PRODUCTS	<ul style="list-style-type: none"> • NICE Workforce Management • NICE Employee Engagement Manager (EEM) • NICE Performance Management
FEATURES	<ul style="list-style-type: none"> • Self-service, rules-based overtime availability • Streamlined management of distributed, diverse agent pool • Improved workflows for WFM analysts

01 THE BEFORE

Navigating a complex post-merger environment

A significant merger between Fiserv and First Data in 2019 created a blended environment, with different workforce management (WFM) systems at each organization. These inconsistencies and overlaps complicated the challenge of introducing each workforce to new lines of business. Fiserv reviewed both solutions and gained a heightened understanding of WFM limitations that were now amplified at the larger organization.

02 DESIRE TO CHANGE

Creating a modern contact center workflow

Fiserv quickly recognized that the inefficiencies of the incumbent systems, as well as the awkward combination between the two, made every WFM limitation more pronounced. "There was a lot of manual task work for our analysts. It made sense to make an investment in new automation," said Matt Howard, Fiserv business systems analyst.

The company has been in a lengthy understaffed period and makes frequent use of overtime, but also recognized that larger blocks of overtime were being scheduled than were strictly needed. Associates were not given clear or immediate feedback when requesting overtime or voluntary time off (VTO), and agents might depart for the day before being informed that their overtime request had been approved.

Analysts were spending a disproportionate amount of their time on manual tasks to approve or decline those requests. And because there were no automated rules or gatekeeping steps, agents could volunteer for overtime outside their skill range. "Analysts had to check in several places to see who could be approved, who was eligible, if they were already working at the time they requested



overtime," Howard said. "These checks took WFM analysts away from their important work: doing analysis!"

03 THE SOLUTION

Selecting the best-in-class NICE solution

Fiserv decided to standardize on NICE Workforce Management across the entire combined organization, and took the opportunity to add Employee Engagement Manager (EEM). EEM adds reliable two-way communication and comprehensive, automated scheduling options from any device to the agent toolkit.

The initial rollout was on an opt-in basis and most agents quickly chose to leave their previous, limited self-service option behind. Fiserv gained efficiencies from the implementation of automatic approvals of requested overtime based on agent characteristics, and from overtime scheduling in increments as short as 30 minutes. Additional rule enforcement and escalation for approval in special circumstances, such as an agent working more than 14 hours in a day or being denied for past abuse of the system, were also introduced.

In all, thousands of hours of overtime and hundreds of additional VTO requests are processed in a typical month by the new solution.

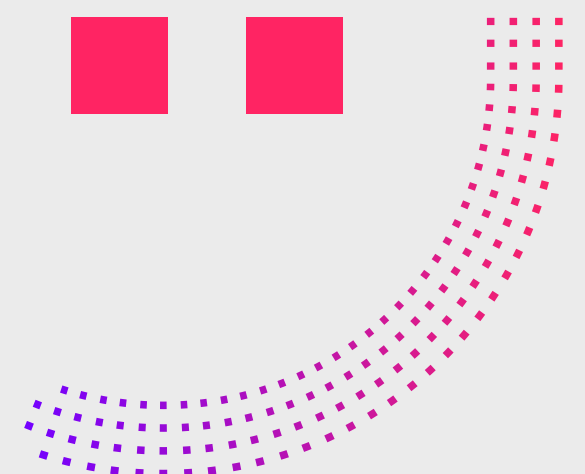
04 THE RESULTS

A smoother experience for agents and managers

After strong uptake of EEM, Fiserv recognized savings from more precise allocation of overtime, made more effective by the automated rules which pair properly-skilled and actually-available agents with only essential periods of extra work. Automated overtime approval alone saves workforce analysts 15 hours of work monthly, while also improving accuracy and visibility for agents.

A streamlined absence-request feature, imported from the legacy First Data workflow, quickly became the most commonly-used component of EEM. In addition to simplifying the agent time-off process, the associated visibility has significantly improved analysts' understanding of real-time absenteeism.

Additional benefits include automatic time zone management, which simplifies the planning process for a hybrid agent pool reaching across the continental United States and Alaska. Agents have also voiced strong approval for schedule visibility from any connected device. Previously, agents had to be sitting at their workstation to review a schedule. Overall, half of the Fiserv agents enrolled in EEM engage with the platform at least once per day.



05 THE FUTURE

Greater refinement on the path to 100% adoption

Fiserv will build on the successful voluntary rollout with a complete phaseout of legacy schedule change practices, further improving efficiencies. In time, the number of distinct work programs managed through NICE Workforce Management and EEM will expand, delivering more refined agent allocations.

As the company's familiarity with EEM grows, analysts will roll out more detailed dashboards and reports for operations leaders, going beyond broad real-time statistics into agent-by-agent alerts. And analysts will use more intraday and future-day scheduling rules, as well as exceptions governing special days like the start and end of the month, to assist with tactical adjustments.

“The biggest thing we’re getting from NICE is accuracy. We are saving money because the overtime hours that we assign are more precise, and better directed toward when the business actually needs them.”

MATT HOWARD
BUSINESS SYSTEMS ANALYST
FISERV

About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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