First United Bank merges SuccessFactors Goals with banking system data to drive growth strategy

First United Bank

First United Bank of Oklahoma (FUB) has a mature goal-setting process and uses a sophisticated talent management technology (SuccessFactors) for tracking goals, but was frustrated by the lack of value being generated by these investments. David Anderson, VP of Organizational Development, had a vision to provide a holistic view of First United's progress towards its strategic growth and lending goals for each organizational level.

- For employees, this would lead to increased awareness of progress towards targets and drive improved individual performance.
- For managers, this would provide timely, detailed insight to current goal progress and help identify high performers and areas of underperformance for coaching and additional focus.
- For executives, it would provide daily insight into KPI performance of core strategy goal execution.

Mr. Anderson knew that to do this, he would have to overcome three significant challenges. The first challenge was merging together SuccessFactors goal targets with transactional data from multiple internal sales and lending systems. That data would be needed to create a consolidated view of performance goal progress. The second challenge to overcome was how to make these key results sets available in a secure portal allowing lending officers, managers, and executives visibility to the information that drives their business. The third challenge was the limited HR budget and resources available to sustain the process. Whatever the solution, it would need to be cost effective, managed by internal HRIS staff, and automated so that this HR staff wasn't burdened with additional manual tasks.

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Business Needs:
- Loan Officers to see daily progress towards their annual lending, referral, portfolio growth, and activity targets
- Lending Managers to see team progress and as well as high and low achievers
- Executives to see company progress towards key strategic growth goals from a KPI, team, and individual perspective

AspireHR Solution
- Daily progress updates of each employee's goal targets with consolidated actual results
- Employee view of individual progress presented in a secured view
- Custom SuccessFactors tiles for managers to view team progress
- SuccessFactors Goals Dashboard to provide Executive's KPI insight

Results:
- Increased employee and company performance
- Accurate progress tracking of company strategic goals
- Identification and retention of high performers
- Daily KPI tracking of lending group performance

Mr. Anderson engaged AspireHR, FUB's SuccessFactors support provider, to design a solution that would overcome these three challenges and deliver the business insight needed by FUB. AspireHR confirmed Mr. Anderson's desire for SuccessFactors to be the secure portal for distribution of the information to employees. Not only would this lower the cost of the project by leveraging an existing technology solution owned by FUB, but it would encourage regular interaction with the SuccessFactors system, thereby increasing the usage and value of the other functionality provided through the talent suite. For the employee and manager experience, AspireHR was able to create custom home page tiles allowing employees to drill into their goal progress and for managers to see team progress and have visibility to individual employee's results. For executives, AspireHR created a goal progress dashboard using SuccessFactors Analytics Dashboard builder. Since this dashboard, which contains a variety of tiles, was based on standard SuccessFactors technology, the FUB SuccessFactors HR Team could customize the tiles and the access using Role Based Permissions and was not dependent on an implementation partner to make updates.

To handle the critical technology challenge of merging data from SuccessFactors with multiple banking systems, AspireHR recommended their HR DataExchange. HR DataExchange is an integration platform that provides easy-to-use data and process-integration capabilities that allow organizations to deploy seamless bi-directional integrations between multiple on-premise and cloud applications. Since there were six (6) data sources and targets already identified and potentially others to be uncovered, it was reassuring to Mr. Anderson that HR DataExchange could provide an unlimited number of connections, was scaleable, and could be used for other future projects.
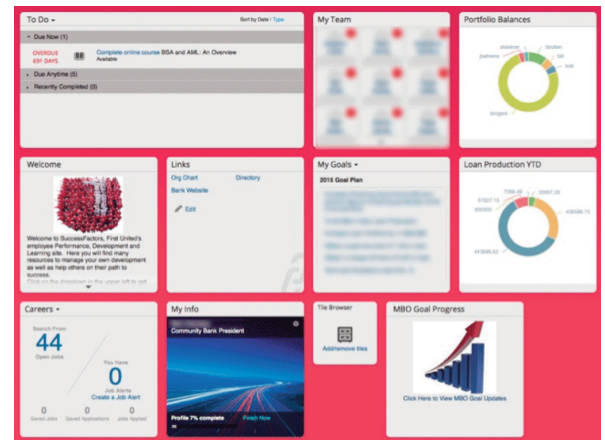
Using HR DataExchange, an AspireHR consultant built an integration process that could be scheduled to run daily and would gather SuccessFactors Goal data and UView, Synapsys, and AS400/Silverlake loan and banking data; identify and merge the records; aggregate and calculate goal progress; and generate a file in a format that could be used to update SuccessFactors.

After deployment, Mr. Anderson was able to use the SuccessFactors Dashboard tools that he was familiar with to adjust the dashboards based on ongoing executive feedback and requests. Without IT assistance, his HRIS personnel were able to adjust the integration to meet the ever-changing needs of a typical HR department.

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