

# CUNA Mutual Group Deploys Neocase to Enable HR Transformation



HR transformation is underway at many businesses, large and small - and on the minds of CEOs and HR executives at many more. Goals typically include HR automation and optimization, improvements in HR service delivery, and a more efficient and effective HR shared services center. If these are your objectives, where do you start? And how do you affect that kind of change?

For CUNA Mutual Group, founded in 1935, HR transformation was part of a larger, three-year transformation effort for the entire company. And a key step in the HR project was an investment in the right technology to make change and improvement possible.

## Challenge: Human Resources Mired in Inefficient, Manual Processes

CUNA Mutual Group is a leading provider of financial services to credit unions, their members, and valued customers worldwide. With more than 70 years of market commitment, CUNA Mutual's vision is unwavering: to be a trusted business partner who delivers service excellence with customer-focused, best-in-class products and market-driven innovation.

To support 4,500 employees in the US, Australia, and Ireland, CUNA Mutual maintains a sizeable human resources department, including 65 HR agents who traditionally have spent a significant amount of time responding to employee requests and questions. The HR team was so busy completing transactional work that they found they could not play a strategic role for the business units they served or sufficiently advise on key issues such as employee development, retention, or succession planning.

Consistency and communication were also challenges for CUNA Mutual's HR department. "We had so many points of entry into HR that common requests were handled in multiple, non-repeatable ways, and this led to inconsistencies in our communications to employees," says Diana Gettinger, Manager HR/IT at CUNA Mutual Group. The company lacked an integrated system for managing knowledge that would allow HR agents to quickly access up-to-date information when responding to an employee's request.

The company also struggled to generate accurate reporting on how effective the HR department was in resolving problems and meeting employee needs. The team spent a good deal of effort trying to put metrics around the work HR did, and in the end they couldn't be confident that what they measured was accurate, Gettinger says: "We were working with an antiquated legacy system that wasn't able to provide us with extensive business intelligence, knowledge management, or advanced SLA management functionality in our HR Shared Services Center (SSC)." An inability to gather business intelligence and generate reports made it difficult for the HR department to accurately forecast and make informed decisions.

## Requirements: Enable HR Transformation with a Comprehensive Solution

"Our business objectives were clear," says Gettinger. "We wanted to create a more efficient and effective HR organization for our company. And we wanted to free up our HR generalists from the transactional, repeatable work and allow them to focus on serving their business units in a more strategic and advisory manner."

To accomplish these objectives, CUNA Mutual knew that it needed to define a single point of entry for its employees to eliminate confusion. The company required a solution that could consolidate various applications in its HR SSC into a single solution, provide transparency across all 65 HR agents, and eventually deliver these benefits to other parts of the organization.

### AT A GLANCE:

*Organization:* CUNA Mutual Group

*Headquarters:* Madison, Wisconsin

*Industry:* Financial Services

### Challenge:

- Ensure efficient, effective and consistent HR service delivery to employees worldwide
- Allow HR generalists to focus more time on strategic and advisory work
- Provide a single point of contact for employees who contact HR

*Solution:* Neocase HRPower, Neocase Knowledge Base (KB)

### Results:

- Greater consistency in communication and transactional tasks
- Significant improvements in staff productivity
- Process transparency in contact center operations
- Extensive KPI reporting for management

*"We now have consistency around transactional, repeatable requests, they're getting handled in exactly the same way each time, and they're getting handled more efficiently."*

- DIANA GETTINGER  
Manager HR/IT  
CUNA Mutual Group

Additionally, CUNA Mutual was looking for a solution that could easily be modified and configured by its HR and IT personnel, without having to involve outside consultants. Moreover, the company needed the ability to implement in a short time frame with high security standards, and to configure the solution to match unique business processes within its HR SSC.

At the end of the day, says Gettinger, the HR department “wanted to understand our current processes, look for the immediate efficiencies that we could gain, and then act on what we learned from understanding these current processes.”

### **Solution: A Foundation for Better Processes, Communication, and Reporting**

CUNA Mutual Group evaluated several vendors before selecting Neocase Software to help lay the foundation for better processes, communication, and reporting. The company implemented Neocase HRPower and Neocase Knowledge Base (KB) in a mere 16 weeks, which helped the company remain on target with its overall HR transformation goals. The on-premise solution was also able to meet CUNA Mutual’s strict security standards.

Neocase handles routine, transactional tasks that would otherwise occupy a significant portion of HR agents’ workload, and it presents all the information agents need in one, consolidated place. For example, integration with Active Directory enables CUNA Mutual’s HR agents to see an employee’s contact information in the Neocase application, saving time at the point of service. Cascading pick lists allow agents to quickly qualify a case, which automatically determines how the case will be routed and resolved. Shortcuts to other HR systems such as the performance management system allow agents to launch those applications from within the Neocase application. Dashboards enable managers to monitor individual cases as well as the overall process, and reporting allows them to gather data for better business decisions.

In brief, Neocase: automates routine tasks and uses technology to drive the service process, provides agents with a reliable source of accurate information and knowledge, and ensures managers gain the business intelligence they need.

### **Results: Harnessing the Transformative Power of Neocase Software**

Neocase delivered on all of its requirements in reporting, SLA management, business process management, data consolidation, and ease of use. “Shortly after we deployed the solution,” says Gettinger, “we saw significant improvements in staff productivity, process transparency in our contact center operations, and the ability to provide top management with extensive KPI reporting.”

CUNA Mutual’s experience typifies that of many companies who conclude that the right technology can drive business processes, consistency, and collaboration. “We now have consistency around transactional, repeatable requests, they’re getting handled in exactly the same way each time, and they’re getting handled more efficiently,” Gettinger says. “We’re already seeing that our HR generalists can now focus more on HR strategic work within their business units.”

For its next phase, CUNA Mutual will deploy Neocase Self Service (SF) to empower its employees with 24/7 secure, easy, and convenient web access to their personal information and inquiry history. Pleased with their overall results in the HR department, CUNA Mutual has already started expanding the solution into other business units, such as customer service.

#### *Implementation Facts:*

- Delivered on all CUNA Mutual’s requirements in reporting, SLA management, business process management, data consolidation, and ease-of-use
- Met CUNA Mutual’s strict security standards and challenging implementation timeline
- Implementation and customization within 16 weeks

*“The knowledge management module has helped greatly in that we know all our HR representatives are using the same documents to answer questions.”*

- DIANA GETTINGER  
Manager HR/IT  
CUNA Mutual Group

For more information about Neocase, please visit:  
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