Nuestro viaje hacia la agilidad, calidad y madurez con alto valor para el negocio

Ana Sanabria – Process Manager
Mario Jimenez – Sr. PQM Manager

September 23rd, 2015

"We cannot accept the status quo. We have to make quality a cultural imperative. Let's be the very best."
Jeff Yabuki – Fiserv CEO

© 2015 Fiserv Inc. or its affiliates.

CONFIDENTIAL-SENSITIVE

PQM
Change to better, better to change.

fiserv.

Agenda

Fiserv GS CR

¿Qué sucede cuando no existen procesos definidos?

Caso de negocios

Nuestro viaje a la madurez

Resultados

Conclusiones

© 2015 Fiserv Inc. or its affiliates.

Fiserv Today

Culture

Vision

Global leader in transaction-based technology solutions

Mission

To provide integrated technology and services solutions that enable best-in-class results for our clients

Values

Earn client trust every day.
Create with purpose.
Inspire and achieve excellence.
Do the right thing.
Deliver on the promise of one Fiserv.

© 2015 Fiserv Inc. or its affiliates.

By the Numbers

$4.5 billion revenue

$772 million free cash flow

27 consecutive years of double-digit EPS growth

Nearly $4 billion returned to shareholders since 2005

Consumer Reach and Scale

120 million deposit accounts

60 million online banking users

23 million active bill payment users

Global Footprint

16,000 clients in more than 80 countries

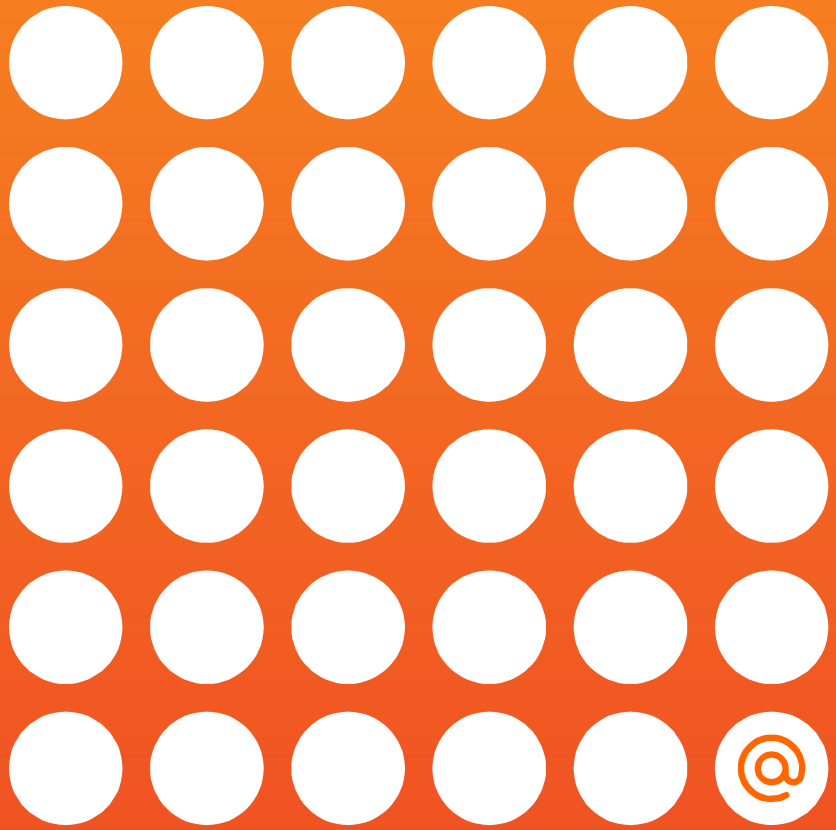
21,000 associates worldwide

Money Movement

More than 20 billion digital payment transactions

More than $1 trillion moved annually

© 2015 Fiserv Inc. or its affiliates.



PQM
Change to better, better to change.

fiserv.

The Early Journey

2004 — The beginning

- JAN. — Day 1:26-Jan-2004 Fiserv Started operations with 10 associates.
- First Building Opening.
- CBS International (today LACC team started operations.
- JUNE — CBS Domestic (today Bank Solution Signature Team) started operations.
- DEC. — Closed with associates 22

2005 — The early journey

- DEC. — Closed with associates 32

2006 — The early journey

- JAN. — ImageSoft (today FRMS-FCRM Team) started operations (This was the first team that started operations outside of the CBS Organization).
- DEC. — Closed with associates 45

2007 — The early journey

- JULY — Second Building Opening.
- AUG. — Operations in Costa Rica transitioned into Global Services. (Transition goal was to leverage joint scale, structure and synergies with India).
- DEC. — 75 Closed with associates

2008 — The expansion

- AUG. — Information Security Office (today CRIS Team) started operations.
- NOV. — ASEFISERV was created.
- DEC. — 99 Closed with associates

PQM
Change to better, better to change.

fiserv.

The Expansion

2009 – The expansion

- JAN – Premier (today Bank Solutions, Community Banks Team) started operations.
  Fiserv launches new master brand strategy and new brand mark
- MAR. – Output Solutions Team started operations.
- JULY – Fiserv Main Building Opening (1F).
- SEPT. – Achieved ISO 27001 Certification (for GS Costa Rica).
- DEC – Closed with associates **120**

2010 – The expansion

- AUG. – Digital Channels-Professional Services Team started operations
- JULY – Main Building First Expansion.
- MAY – Financial Shared Services Center started operations.
- SEPT. – Digital Channels – Product Development Team started operations.
  ETG Team started operations.
- DEC. – Closed with associates **145**

2011 – Maturity and world-class operation

- FEB. – Investment Services Team.
- MAY – Credits Unions Team.
- JUNE – FRMS-(RMS/RPS/NPS) Team.
- JULY – SAP is implemented ~60% of Fiserv; CR FSSC has responsibility for PO and Invoice Processing (for the US & Canada).
- AUG. – Digital Channels-Mobiliti Team.
- DEC – Closed with associates **292**

2012 – Maturity and world-class operation

- FEB. – Revenue Enhancement Team started operations.
- JUNE – Team Buildings framework was created.
- JULY – Last wave of business units transitioned to SAP, with FSSC handling the PO and invoice processing for US, Canada & Puerto Rico.
- AUG. – Lending Solutions Team started operations.
- SEPT. – Main Building Second Expansion.
- OCT. – Recruitment Team started operations.
- DEC. – Closed with associates **360**

2013 – Maturity and world-class operation

- JAN. – Formal establishment of the PQM Team.
  Local HR operation was merged into Corporate HR, under International HR.
- FEB. – Formal establishment of the "Fiserv Gives Back" program.
- JUNE – Information Management Solutions (IMS)Team.
- SEPT. – Business Analysis Center of Excellence Launch.
- NOV. – Open Solutions Team.
- DEC. – Closed with associates **414**

PQM
Change to better, better to change.

fiserv.

10 years and Counting

2014

10 years and counting

- **JAN** — Begin transformation into a Trust-based Wining Culture.
  Internal Communication Team.
- **MAR.** — First certified Six Sigma Black Belt associate in GS CR.
  Aspiring Architect Program Launch.
- **APR.** — IT Team ServiceDesk Launch.
- **JULY** — End to end ownership of product support for LACC (first outcome-based service offering).
- **AUG.** — Programathon 1.0
- **NOV.** — CMMi Level 3.
- **DEC** — Closed with associates **460**

TODAY AND BEYOND...

The consolidation as a strategic service and resource provider for Fiserv.

Focus on **delivery excellence and KPI-driven operations**. GS Costa Rica leads the first true collaboration with our GS India team (ISM-LPS) to provide 24*7 support services to our clients.

© 2015 Fiserv Inc. or its affiliates.

Fiserv – Global Services Costa Rica

2004

Enero 10

Diciembre 22

2014

Diciembre 460

2015

Diciembre ~600

2016

Diciembre +800

© 2015 Fiserv Inc. or its affiliates.

CONFIDENTIAL-SENSITIVE

PQM

Change to better, better to change.

fiserv.

#1 online banking
– Mercator Advisory Group

Leading vendor of Payments Fraud Management Solutions
– IDC Financial Insights

Best AML Compliance Solution Provider
– Waters

XCelent Customer Base 2012 Award for anti-money laundering and anti-fraud solutions
– Celent

Best-in-class in Financial Crime Prevention
– Aite Group

Named the
Best Electronic Commerce Provider
– Global Finance magazine

#1 biller direct and walk-in U.S. payment provider
– Aite Group

Best Practices Award for Enterprise Data Management Strategies
– The Data Warehousing Institute

Best-in-class for mobile banking for the second year in a row
– Javelin Strategy & Research

Named to the InformationWeek 500 – the most innovative companies employing information technology in their business – annually since 2005

Named one of the Top 50 Service Providers
– Mortgage Technology

Leading provider of bill pay and presentment services
– Aite Group

Some clients of GS CR

PQM
Change to better, better to change.

fiserv.

Serving 16,000 Clients Worldwide

© 2015 Fiserv Inc. or its affiliates.

Market Leadership and Scale

Digital Channels

#1 Online Banking Solution

#1 Mobile Banking Solution

Electronic Payments

#1 Bill Pay and E-Bill Network

#1 P2P, A2A, ACH

Top 5 Debit Provider

Account Processing

More than

1 in 3

U.S. Financial Institutions

© 2015 Fiserv Inc. or its affiliates.

Market Leadership and Scale

Digital Channels

60M Online Banking Users

7M Mobile Banking Users

Electronic Payments

23M Active Bill Pay Users

55M Debit Accounts

Account Processing

5,200 U.S. Clients

120M Deposit Accounts

FORTUNE
WORLD'S MOST
ADMIRED
COMPANIES®
2015

Forbes | 2015
AMERICA'S BEST
EMPLOYERS
POWERED BY STATISTA

PQM
Change to better, better to change.

fiserv.

Tecnologías, metodologías y procesos

PQM
Change to better, better to change.

fiserv.

Propiedad de los Procesos de Desarrollo de Software

Equipo	Nivel de Propiedad
Credit Unions-Wire Exchange	
Signature-Product Support	
Signature-Aperio	
Open Solutions-DNA	
ETG-SAP Practice	
FRMS-Fraudguard	
FRMS-Risk Management Solutions	
Lending Solutions-FLEX	
IMS-Development	
Output Solutions	
DC - PD-Prod DEV - COASP (Integrations)	
DC - PD-Prod DEV - SET (COASP)	
DC - PD -Mobiliti SET	
DC - DC-Mobiliti Development	

De 0 a 20% De 20 a 40% De 40 al 60% De 60 al 80% De 80 al 100%

© 2015 Fiserv Inc. or its affiliates.

our best | Madurez

© 2015 Fiserv Inc. or its affiliates.

fiserv.

¿Qué significa madurez?

Organizaciones no maduras

- Procesos personales, ad hoc y caóticos
- Calidad impredecible
- Proyectos con riesgos altos
- Altamente reactivas
- Stress

Organizaciones maduras

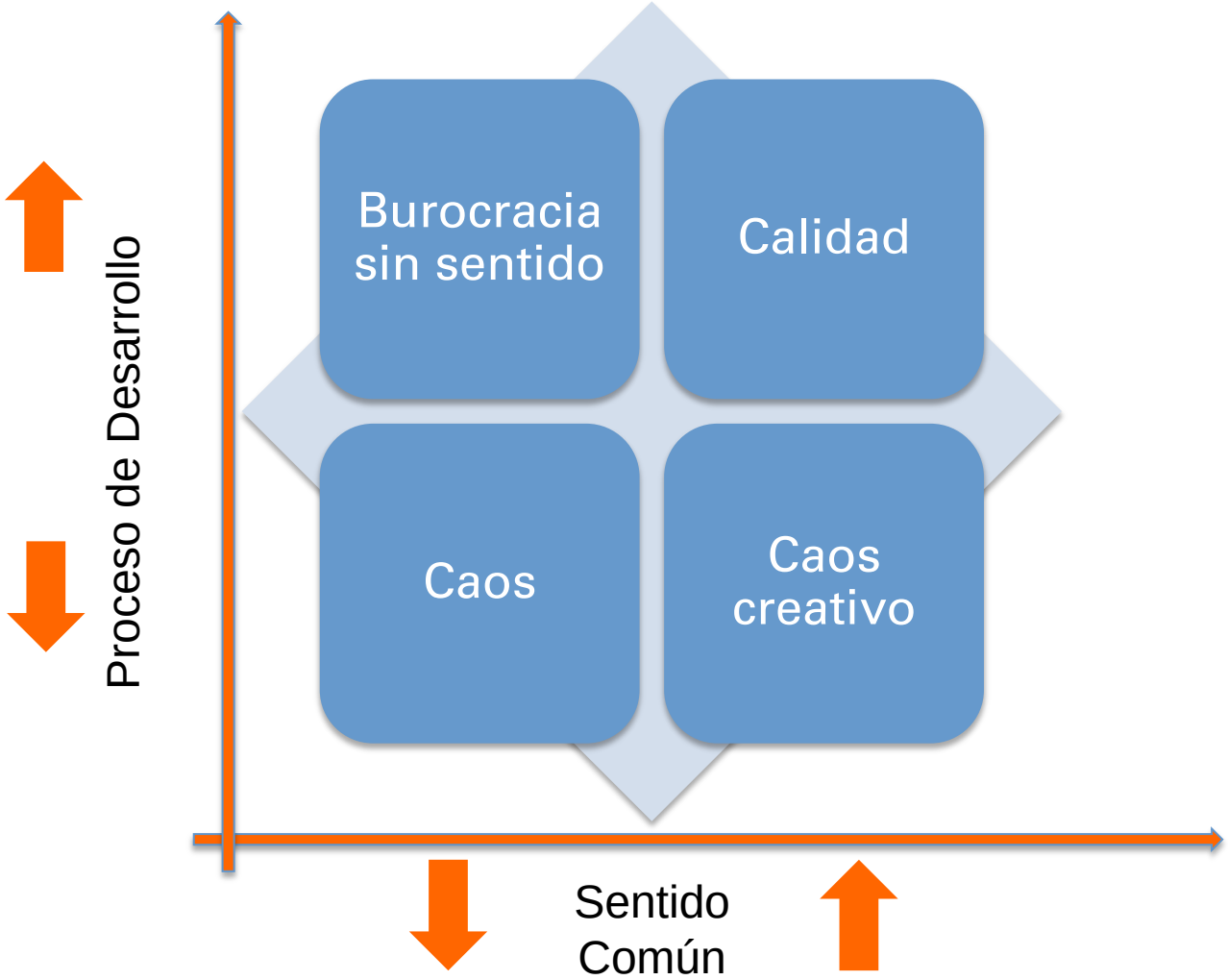
- Calendarios realistas
- Reutiliza los procesos
- Más proactivas
- Gerentes con visibilidad de los resultados
- Existen métricas e indicadores

Mitos sobre CMMI

- No es una píldora que se toma y se van todos los males
- No es una metodología
- No es un estándar
- No es una alternativa a ITIL
- No nos dice qué es lo que tenemos que hacer

© 2015 Fiserv Inc. or its affiliates.

¿En cuál cuadrante estamos?



@ our best

© 2015 Fiserv Inc. or its affiliates.

fiserv.

Caso de negocios

Perspectiva y retos 2012

- Múltiples tecnologías
- Múltiples metodologías
- Control limitado del proceso completo de desarrollo
- Competencia interna para atraer unidades de negocio
- Alta rotación de personal
- Iniciativas globalTZD

GS Costa Rica Strategic priorities

03.

Fiserv Costa Rica is a cost-effective, mature, quality-focused, data-driven, easy-to-work-with Service and Resource provider and is regarded as such by our business partners and clients, who find value beyond cost-arbitrage.

PQM

fiserv.

Caso de negocios (cont.)

Categoría de desempeño	Mejora promedio
Costo	34%
Cronograma	50%
Productividad	61%
Calidad	48%
Satisfacción del cliente	14%
Retorno de la inversión	4.0 : 1

Fuente: SEI – Carnegie Mellon University
Performance Results of CMMI Based process improvement

Caso de negocios (cont.)

En términos operativos, significa que se debe alcanzar:

- Mejora significativa de la eficiencia del personal
  - Reducción de tiempo de ciclo por eliminación de re-trabajo
  - Reducción de defectos pre-entrega
  - Reducción de costos de mantenimiento
- Mejora significativa en la confianza del cliente
  - Reducción de defectos post-entrega
  - Reducción de casos de soporte
- Mejora en el capital humano
  - Incremento en la moral y lealtad
  - Reducción de rotación
  - Reducción de re-entrenamiento

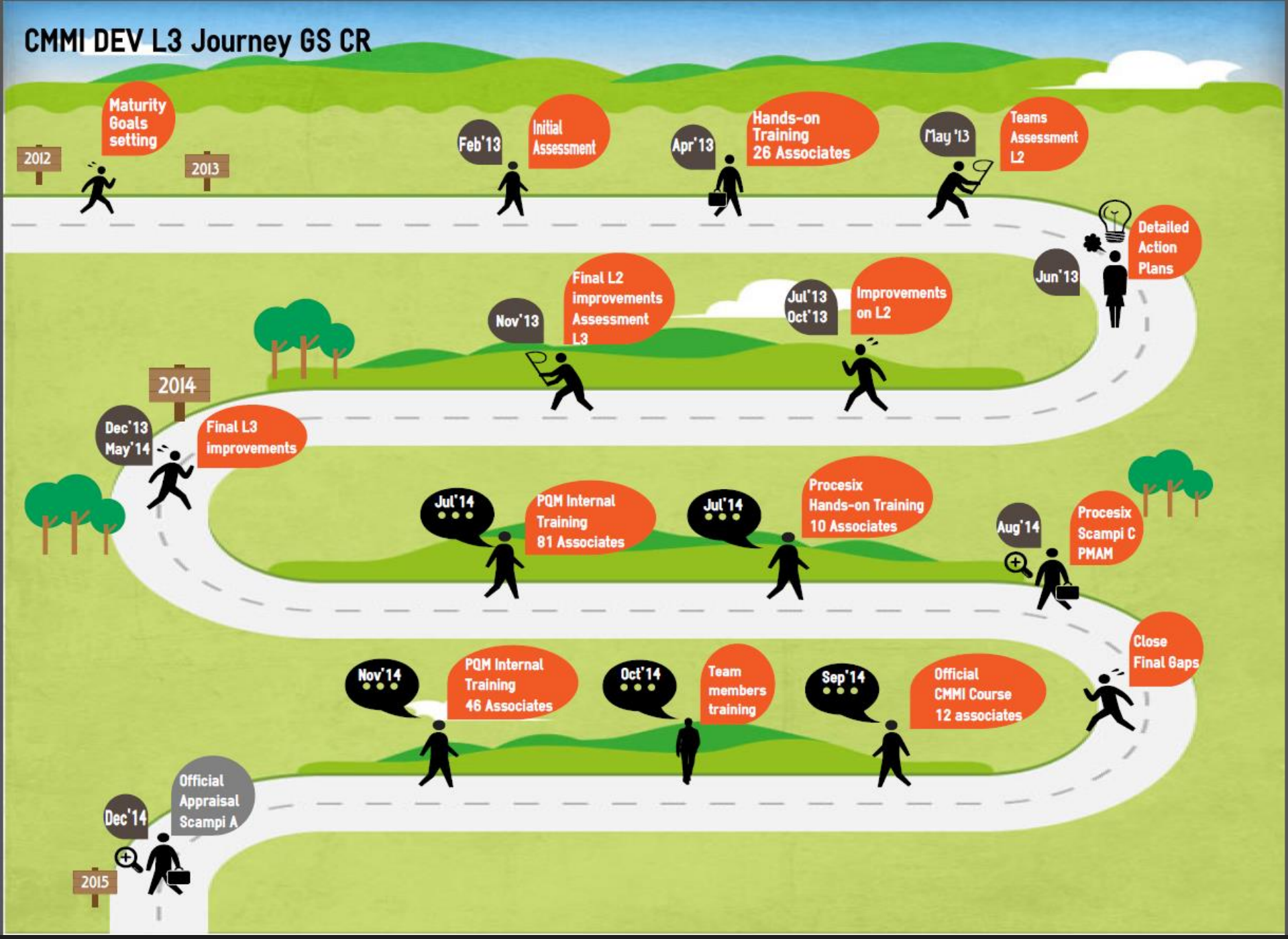
© 2015 Fiserv Inc. or its affiliates.

our best

El viaje a la madurez

© 2015 Fiserv Inc. or its affiliates.

fiserv.


CMMI DEV L3 Journey GS CR
2012
Maturity Goals setting
2013
Feb'13
Initial Assessment
Apr'13
Hands-on Training 26 Associates
May '13
Teams Assessment L2
Jun'13
Detailed Action Plans
Jul'13 Oct'13
Improvements on L2
Nov'13
Final L2 improvements Assessment L3
2014
Dec'13 May'14
Final L3 improvements
Jul'14
PQM Internal Training 81 Associates
Jul'14
Procesix Hands-on Training 10 Associates
Aug'14
Procesix Scampi C PMAM
Close Final Gaps
Nov'14
PQM Internal Training 46 Associates
Oct'14
Team members training
Sep'14
Official CMMI Course 12 associates
Dec'14
Official Appraisal Scampi A
2015

Manejo del Cambio

Preparando a la organización

- La persona que guía el proceso debe conocer el modelo, con experiencia probada en CMMI.
- Se definieron equipos técnicos (technical working groups) combinando asociados de los equipos y personas del equipo de PQM (mejora de procesos) que actuaron como facilitadores.
- El equipo técnico hizo el assessment (ellos conocen sus propios procesos), pero también guiaron la iniciativa, dándoles un sentido de pertenencia.
- No se adaptó la organización al modelo, en vez de eso, se evaluó la forma en que el proceso se llevaba a cabo usando el modelo.
- Se aplicaron mejoras que realmente añadieron valor, de otra forma, nadie las iba a utilizar.

© 2015 Fiserv Inc. or its affiliates.

Puntos de Control

Definición del método y alcance

Entrenamiento Inicial
- Grupos de trabajo técnicos
- Roles Clave/primeros en adoptar

Evaluación interna
- Reuniones de seguimiento
- Identificación de mejoras
- Ejecución de planes de mejora

Adopción
- Entrenamiento extensivo
- Campaña interna

Evaluaciones externas Preliminares
- PMAM (SCAMPI C)
- Auditoría externa de procesos organizacionales

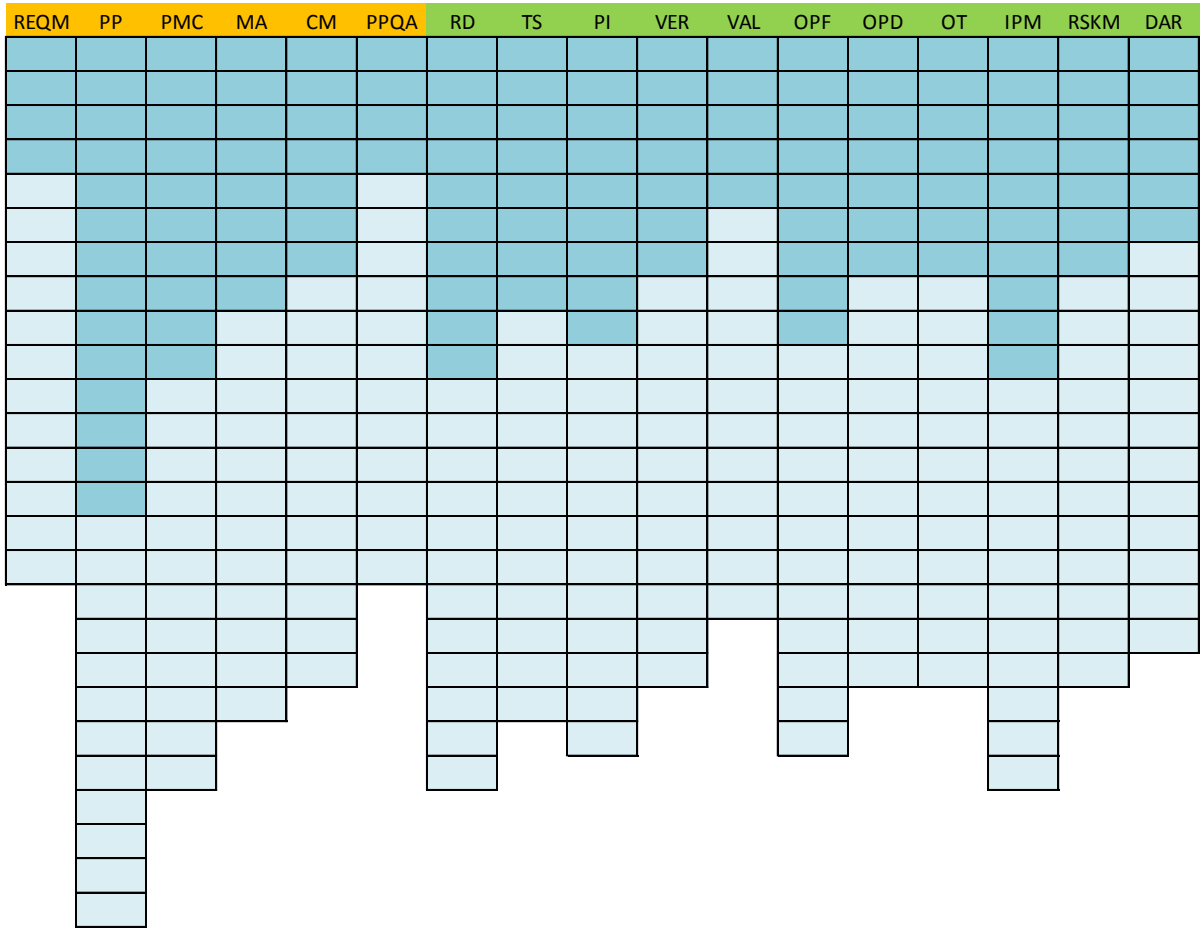
Preparación para SCAMPI
- Implementación de Mejoras
- Entrenamiento para el SCAMPI
- Selección de "Team Members"
- Selección de proyectos

CMMIDEV/3℠
Exp. 2017-12-19 / Appraisal #23367

© 2015 Fiserv Inc. or its affiliates.

fiserv.

¿Cómo se demuestra la madurez de la organización?



336

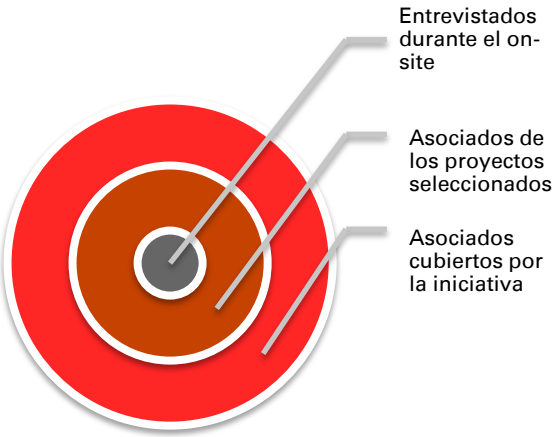
Nivel 2	REQM	Requirements Management
	PP	Project Planning
	PMC	Project Monitoring and Control
	MA	Measurement and Analysis
	CM	Configuration Management
	PPQA	Process and Product Quality Assurance
Nivel 3	RD	Requirements Definition
	TS	Technical Solution
	PI	Product Integration
	VER	Verification
	VAL	Validation
	OPF	Organizational Process Focus
	OPD	Organizational Process Definition
	OT	Organizational Training
	IPM	Integrated Project Management
	RSKM	Risk Management
	DAR	Decision Analysis and Resolution

	Práctica específica
	Práctica genérica

Manejo del Cambio: Entrenamiento extensivo

A mayor conocimiento, mayor preparación

- ✓ CMMI for Dev Fundamentals (por PQM)
  - 2014: 81 asociados, 2015: 65 asociados
- ✓ Preparación para SCAMPI A
  - 40 asociados
- ✓ Preparación para el On site (SCAMPI Readiness)
  - 25 asociados
- ✓ Official CMMI Institute Training
  - CMMI for Dev
  - SCAMPI Team Member
    - 10 asociados (40% más del número requerido, para cubrir imprevistos)



© 2015 Fiserv Inc. or its affiliates.

31

Comunicación Especializada

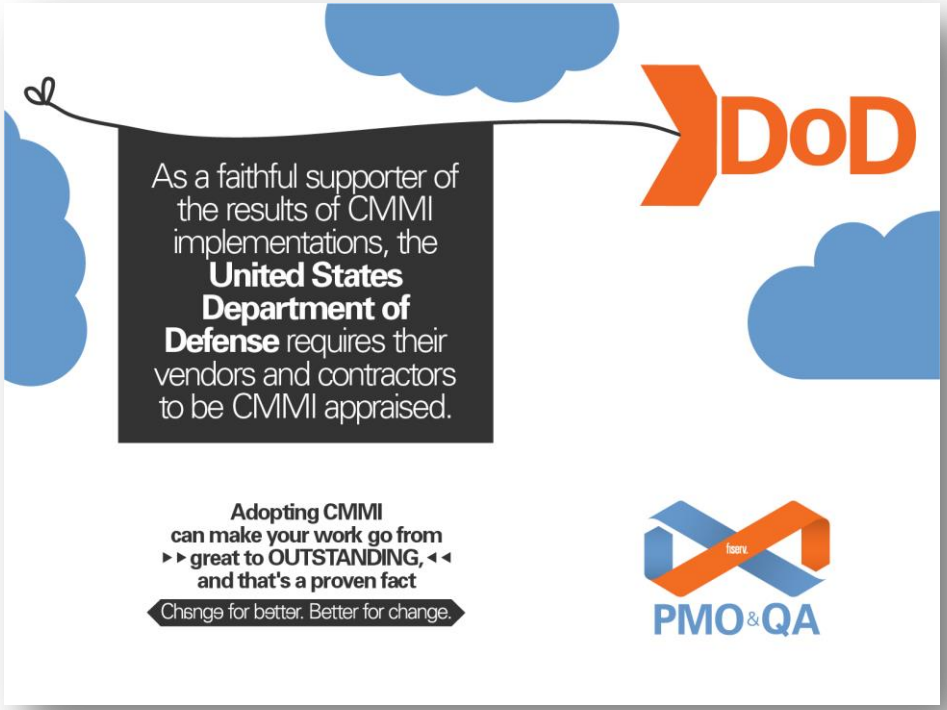
Mercadeando una idea

- PQM estableció metas y dejó que las personas especializadas preparan una campaña.
- Los conceptos fueron reforzados cuando fue posible, utilizando ejemplos reales de trabajo diario.
- La imaginación y la innovación fueron los ingredientes principales.

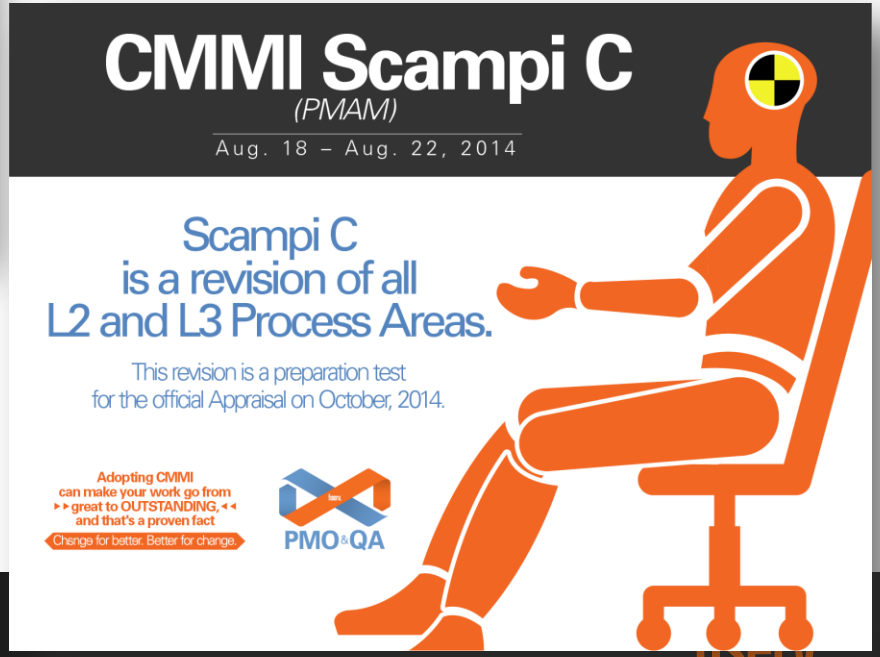
© 2015 Fiserv Inc. or its affiliates.

32

Ejemplos de Campaña



e-mails

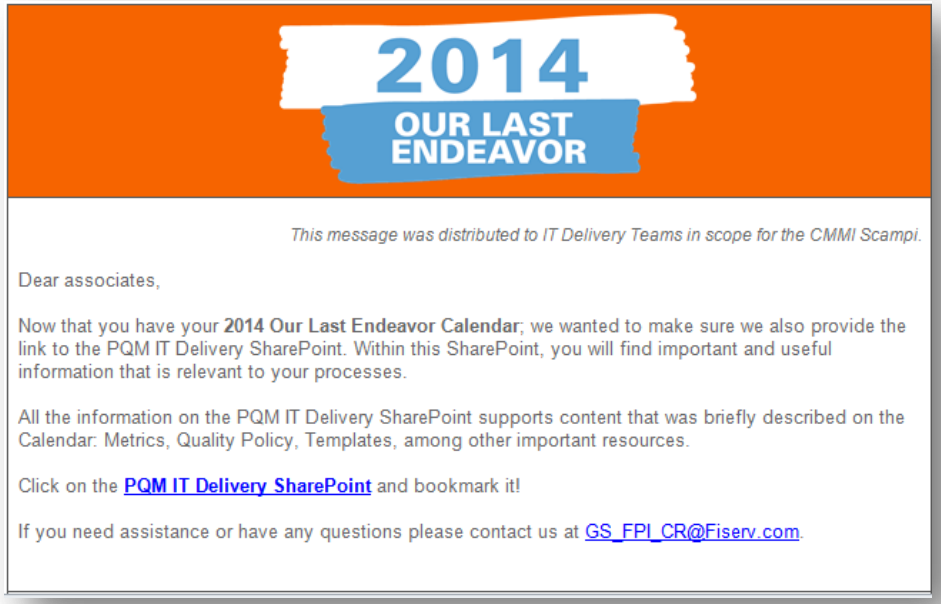


posters

© 2015 Fiserv Inc. or its affiliates.

Ejemplos de Campaña

20 days Calendar



© 2015 Fiserv Inc. or its affiliates.

Resultados

our best

© 2015 Fiserv Inc. or its affiliates.

PQM
Change to better, better to change.

fiserv.

Resultados del SCAMPI

CMMI Institute

Published Appraisal Results

Filter Results

Model/Constellation:	
Maturity Level:	
Year:	2014
Country:	Costa Rica
Organization:	

Apply Filter | Clear Filter

Organization / Organizational Unit	Team Leader / Sponsor	Appraisal End Date	Model (Representation): Maturity Level
FISERV GS Costa Rica / IT Delivery	Pablo Henriquez / Francisco Alba	12/19/2014	CMMI-DEV v1.3(Staged):Maturity Level 3

CMMI DEV /3 SM

Exp. 2017-12-19 / Appraisal #23367

PQM
Change to better, better to change.
fiserv.

Certificado Oficial

PROCESIX INC.

CMMI Institute Partner
Powered by Carnegie Mellon

Acknowledgement of achievement

This is to acknowledge that

Organization: FISERV GS Costa Rica

Organizational Unit: IT Delivery

Heredia, Costa Rica

was appraised in conformance with the Standard CMMI Appraisal Method for Process Improvement v1.3 (SCAMPI℠) against CMMI℠-DEV v1.3 (Staged Representation)

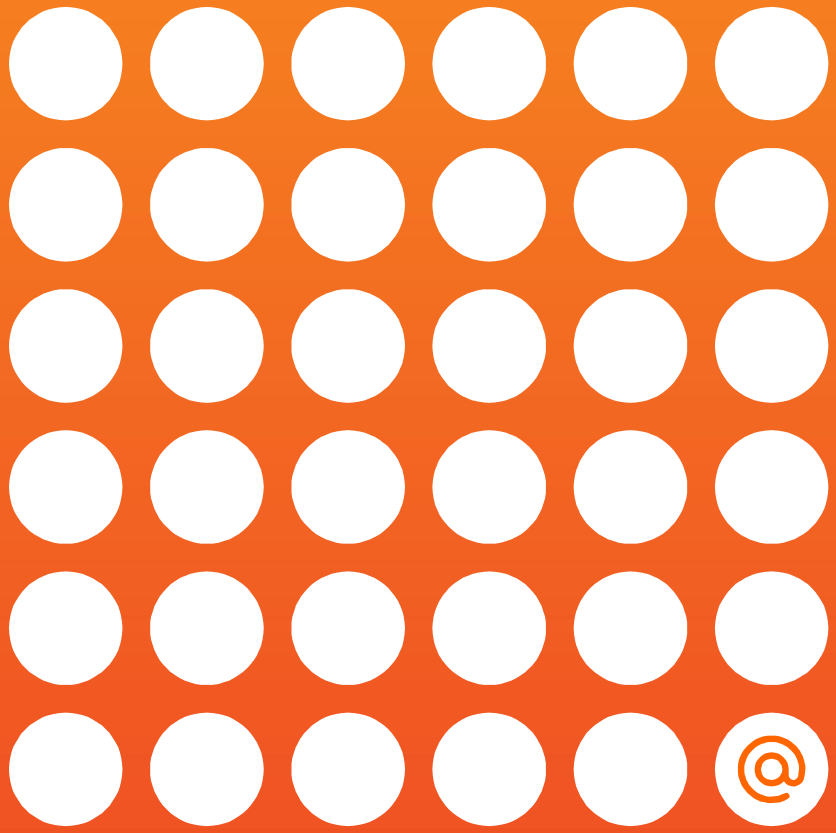
The organizational unit was rated at CMMI℠-DEV Maturity Level 3

Location: Heredia, Costa Rica; Period: December 12th thru 19th 2014
Appraisal SCAMPI v1.3 # 23367

Pablo Henríquez, Vice-president of Procesix
Certified SCAMPI Lead Appraiser ID# 0400435-01

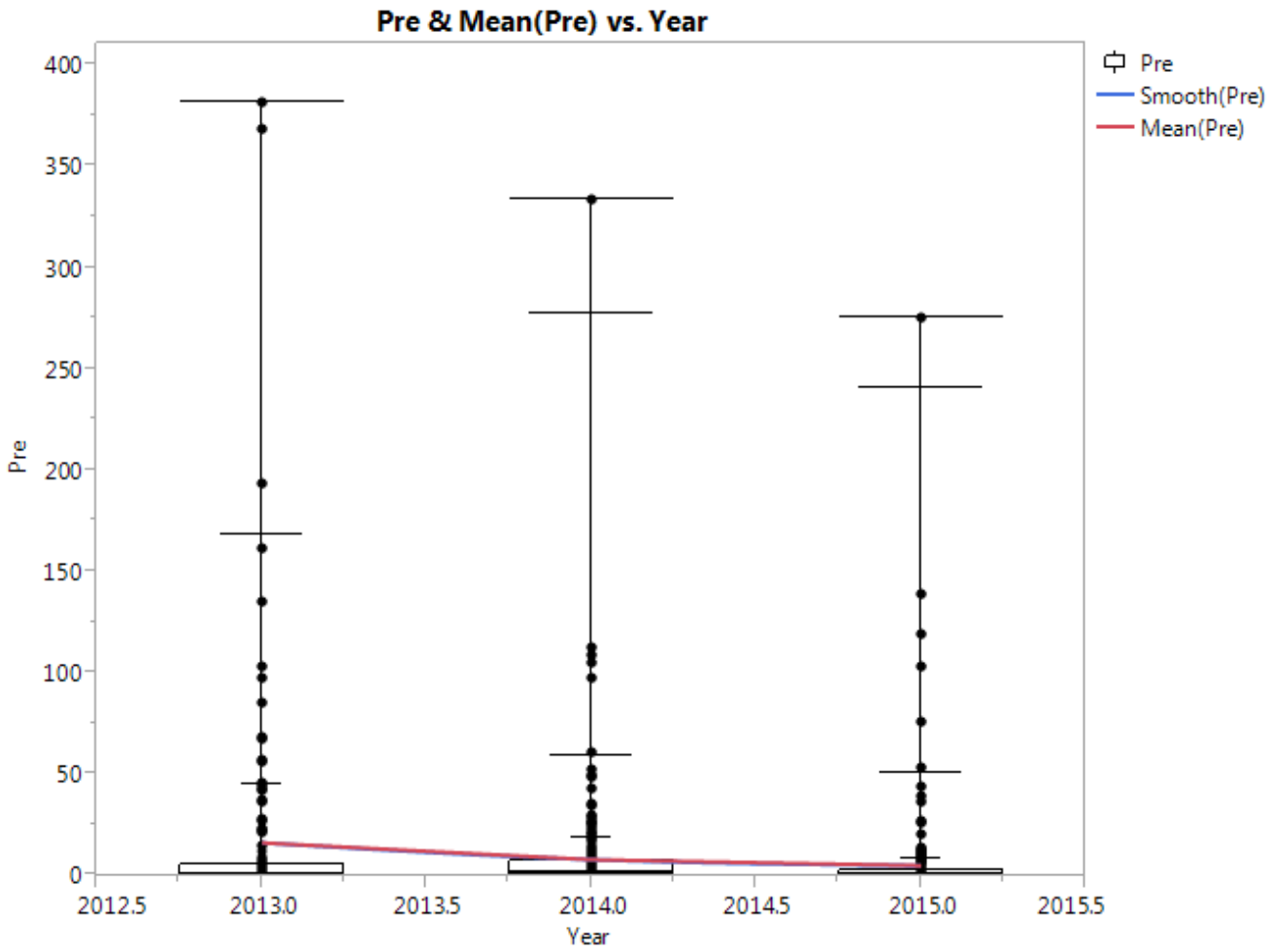
CMM, CMMI, Capability Maturity Model and Carnegie Mellon are registered in the U.S. Patent and Trademark Office by Carnegie Mellon University; SEI (Software Engineering Institute), CMMI, CMM Integration and SCAMPI are service marks of Carnegie Mellon University

Delivery



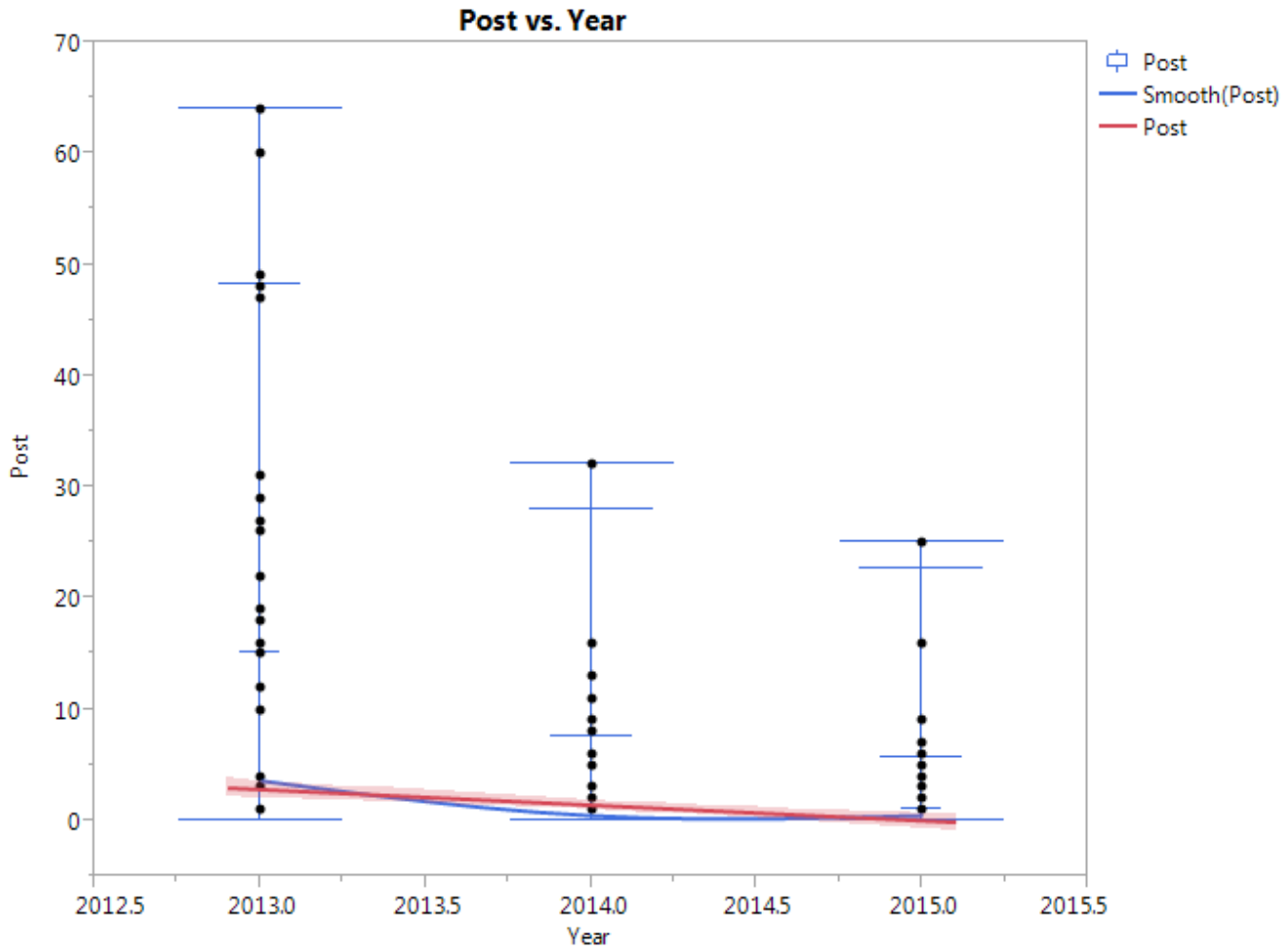
© 2015 Fiserv Inc. or its affiliates.

Mejoras en defectos pre-entrega

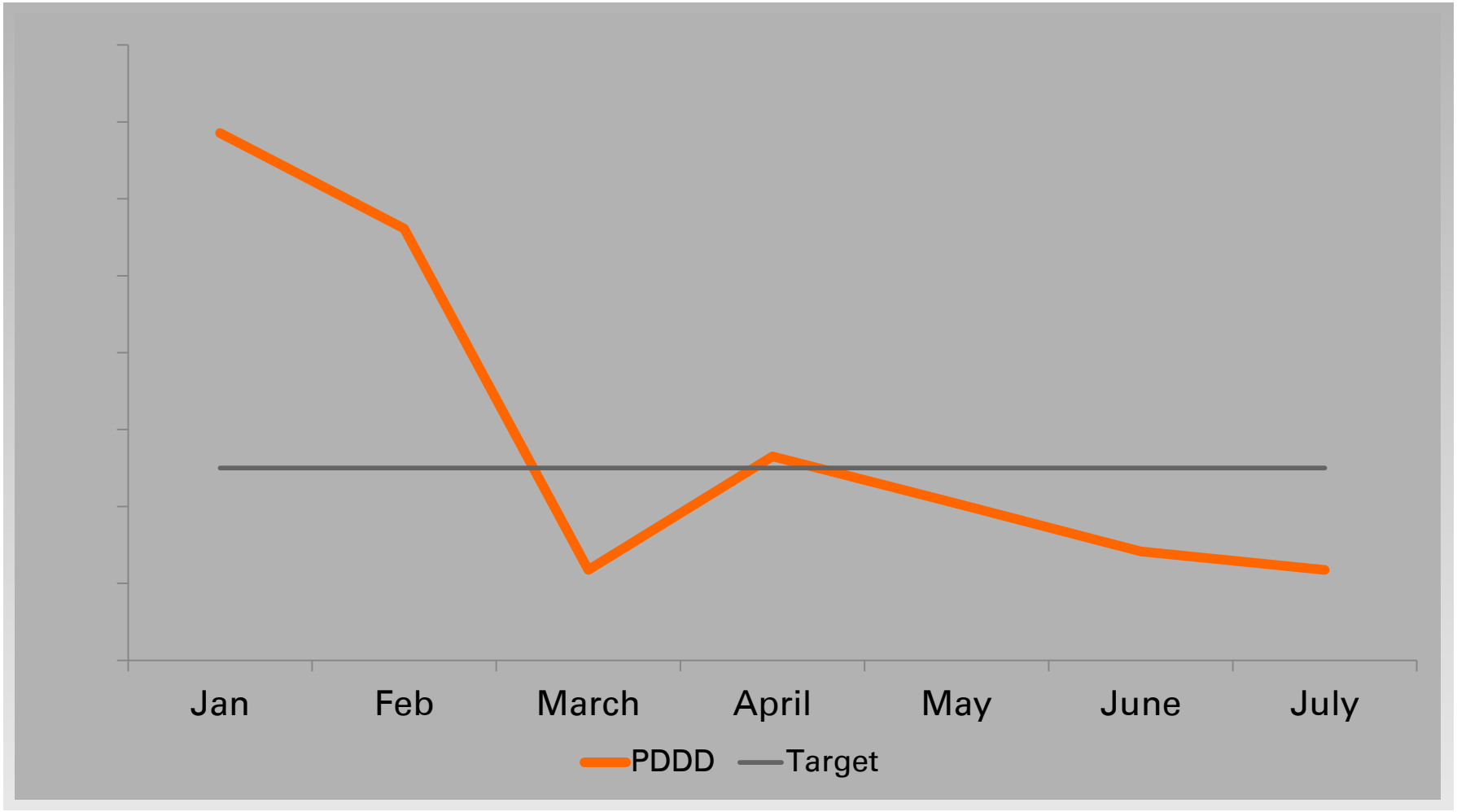


© 2015 Fiserv Inc. or its affiliates.

Mejoras en defectos post-entrega



PDDD 2015 (Ene-Jul)



© 2015 Fiserv Inc. or its affiliates.

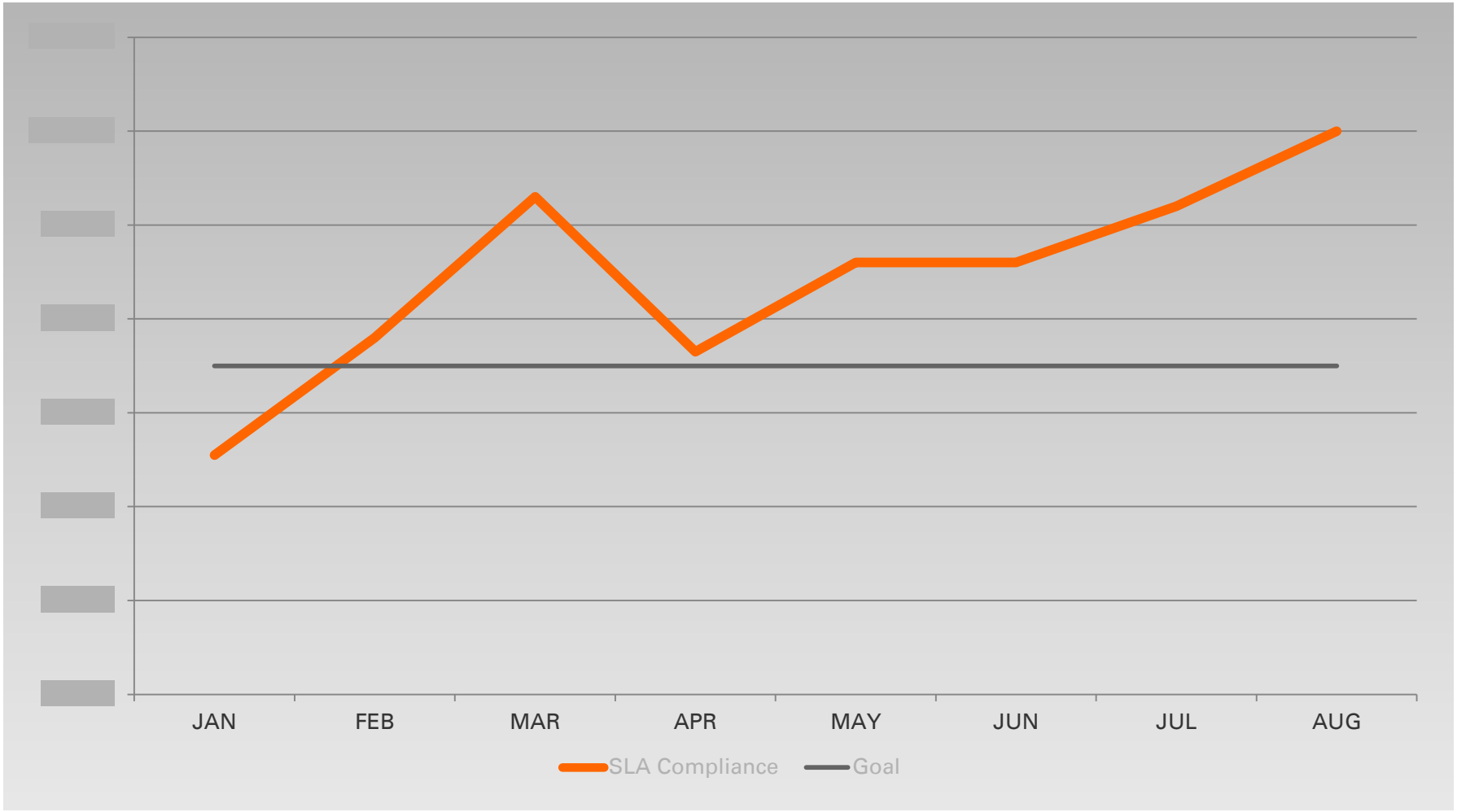
Resumen de mejoras en calidad

Year	Pre Delivery	Post Delivery	Overall Improvement
2013	16.34	3.64	
2014	8.06	0.492	111.82%
2015	5.1	0.512	22.27%

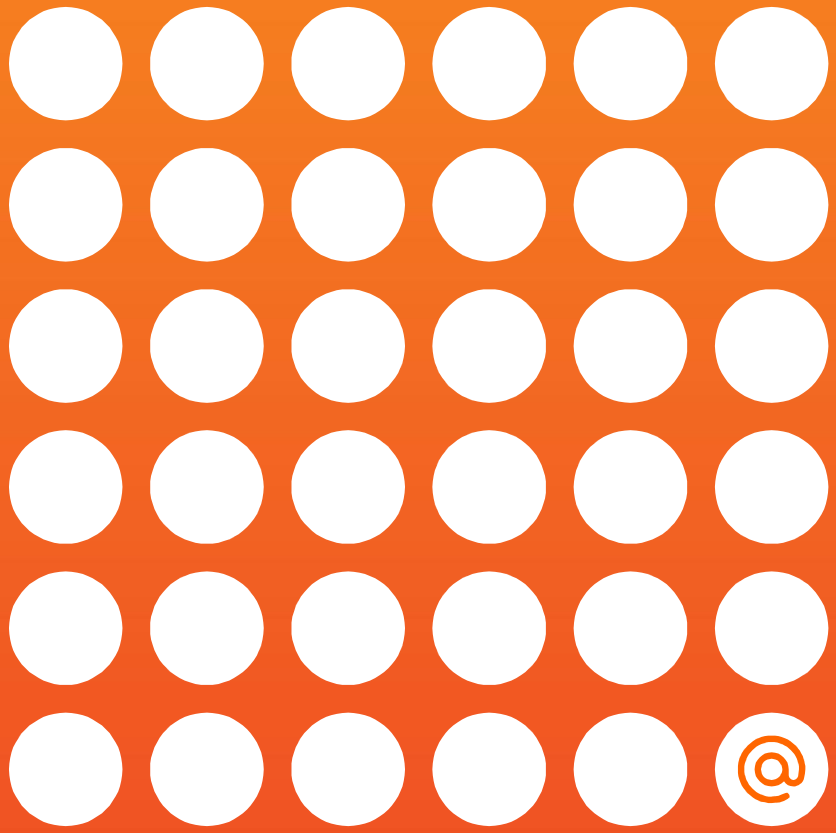
$$Total\ Effort = Predelivery * Effort - Rate_{pre} + Postdelivery * Effort - Rate_{post}$$
$$Total\ Cost = Total\ Effort\ * Cost - Rate$$

	Pre-Delivery		Post-Delivery			
Year	Total Effort	Total Cost	Total Effort2	Total Cost3	Cost of Quality	Savings

LACC 2015 SLA Compliance



Business Support

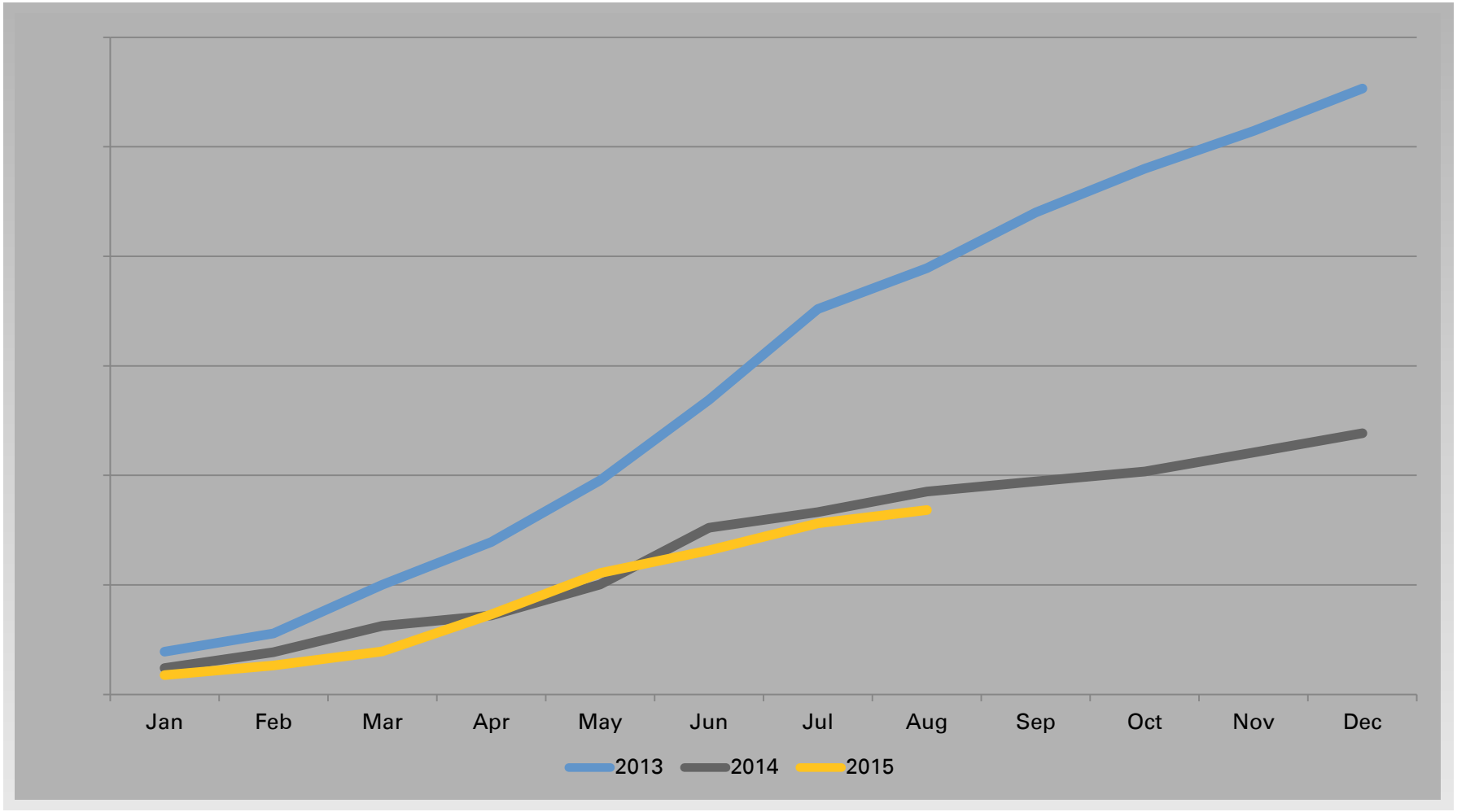


© 2015 Fiserv Inc. or its affiliates.

PQM
Change to better, better to change.

fiserv.

Rotación de personal acumulada (2013-2015)



© 2015 Fiserv Inc. or its affiliates.

GS Costa Rica 2014 Results

Your Voice survey

Dimension	Fiserv overall	GS CR 2013	GS CR 2014	Relative improvement	Best at Fiserv
Engagement				47%	
Manager effectiveness				24%	
Quality				50%	
Trust				18%	
Growth and development				17%	
Recognition				20%	
Business acumen				33%	
Client focus				10%	
Market insight				20%	
Communication				43%	

GS Costa Rica 2014 Results

Target Zero Defects (TZD)

- First project to be delivered **with zero defects**
  - **SERVUS – Project of the year for DC- Mobiliti**
  - Total of 24 pre-delivery defects, **ZERO DEFECTS** post-delivery

Project SERVUS team

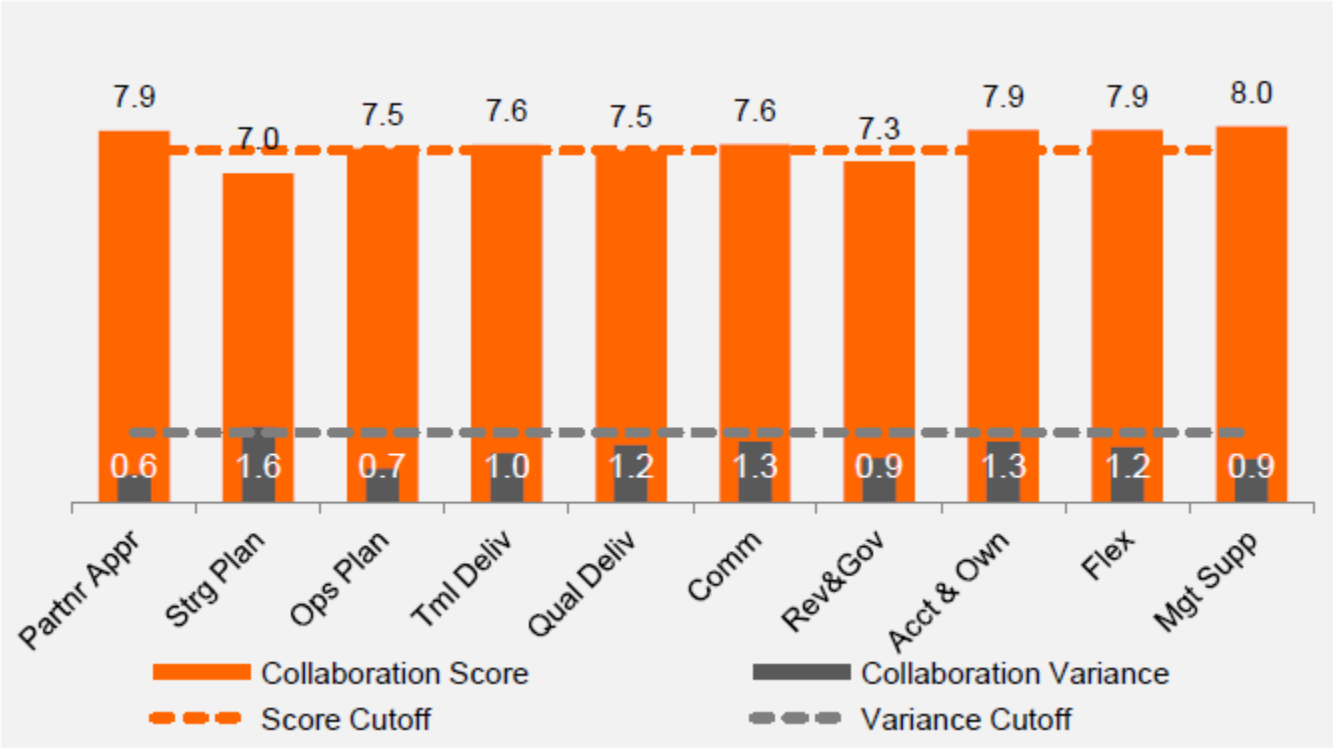
Brainer Vargas	Esteban Cruz	Joyse Vargas	Fernando Fernández	Federico Dávila
Jimmy Navarro	Carlos Salazar	Alejandro Quirós	Jesús Mena	

© 2015 Fiserv Inc. or its affiliates.

GS Costa Rica 2014 Results

Global Delivery Collaboration Survey (GDCS)

- Collaboration index for GS CR is (7.7, 1.1) **GREEN**
  - Effective partnership – High score with low variance
  - Collaboration score: 7.7 is above the 7.5 target
  - Collaboration variance: 1.1 below the target of 1.5



© 2015 Fiserv Inc. or its affiliates.

Conclusiones

© 2015 Fiserv Inc. or its affiliates.

Conclusiones

- ¡La calidad paga!
- Las mejoras son percibidas por los asociados y por los clientes
- La resistencia se convirtió en entusiasmo
- Es difícil llegar, pero más difícil mantenerse
- Lo importante es el viaje y los beneficios. La aprobación de la valoración externa viene como resultado
- No es ciencia de cohetes, lo que se necesita es disciplina

© 2015 Fiserv Inc. or its affiliates.

Ana Sanabria

Ana.sanabriaelizondo@fiserv.com

Mario Jiménez

Mario.jimenez@fiserv.com