Ohio Shared Services
Associate Employment Experience

October 28, 2013
Purpose
A workforce plan outlines how an organization will prepare employees for future state of operations.

Overview
The OSS Associate Workforce Plan outlines the activities that prepare OSS associates for their new role and enable them to succeed in the new shared services organization.
OSS Mission & Vision

Mission

*Execution, Efficiency, Customer Service*

Ohio Shared Services executes administrative transactions for its customers while skillfully balancing efficiency and customer service to add value through lower cost and improved effectiveness. Our primary key to success is a highly motivated, top performing, self-directed workforce.

Vision

*Best In Class, High Performing Public Service Entity*

Ohio Shared Services is nationally recognized as a public sector pioneer that manages multiple business processes for a variety of public sector entities. It is recognized as best-in-class in serving its customers, in maintaining a high performance workplace and in recognizing employees as its most critical asset.
Definition

SDWTs are groups of employees who have day-to-day responsibility for managing themselves and the work they do with minimum direct supervision. Members of self-directed teams handle job assignments, plan and schedule work, make production and/or service-related decisions, and take action to address problems.

OSS SDWTs

- **Coordinate** team member work schedules, PTO, and out of office time
- **Allocate** work within team (with direction from team captain)
- **Determine** learning and development opportunities
- **Contribute** to team staffing decisions
OSS/OCSEA Partnership

Agenda
OSS and OCSEA Partnership

The OSS and OCSEA partnership empowers associates to participate in center advisory councils in order to continuously improve OSS.

- **OCSEA/OSS Partnership Committee**
  - Approve recommendations that deviate and innovate from the OCSEA contract with the State of Ohio and recommend them to OCSEA and OBM leadership and other appropriate State leadership
  - Consider and provide feedback on non-contractual issues critical to the success of the center
  - Create, charter, and populate work groups as necessary

- **Shared Services Associates Advisory Council**
  - Provide input on performance management process including review of individual and team measures used
  - Recommend to the Partnership Committee the performance evaluation instruments, rating schemes, and implications of ratings

- **Continuous Improvement Advisory Council**
  - Consider improvement opportunities/suggestions that impact overall OSS efficiency and effectiveness; provide input/recommendations to OSS leadership
  - Recommend improvements for consideration by the OSS Process Council

- **Training & Development Advisory Council**
  - Assist OSS management in developing a well-skilled workforce
  - Review training offerings and assure that they meet the needs of associates and the business
Agenda
OSS Organizational Structure

OSS is comprised of two segments: contact center and transaction processing.
# OSS Associate Teams and Responsibilities

OSS associates align to contact center or transaction processing teams. Outlined below are associate responsibilities:

<table>
<thead>
<tr>
<th>Associate Type</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td><strong>Contact Center</strong></td>
<td>▪ Monitor queues for inbound calls, e-mails, and faxes</td>
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<td></td>
<td>▪ Follow Service First philosophy in all customer interactions</td>
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<td></td>
<td>▪ Operate and <strong>access</strong> various systems to research responses</td>
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<td></td>
<td>▪ Escalate inquiries when necessary and <strong>assign</strong> cases to the transaction processing team when appropriate</td>
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<tr>
<td><strong>Transaction Processing</strong></td>
<td>▪ <strong>Process</strong> P.O. and non-P.O. vouchers</td>
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<td></td>
<td>▪ <strong>Perform</strong> pre-audit activities for T&amp;E reimbursement requests</td>
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<td></td>
<td>▪ <strong>Perform</strong> vendor set-up and vendor master data maintenance requests</td>
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<td></td>
<td>▪ <strong>Handle</strong> cases assigned from OSS Contact Center</td>
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<tr>
<td><strong>All</strong></td>
<td>▪ <strong>Coordinate</strong> work schedules with associates, team lead, and coach</td>
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<td>▪ <strong>Document</strong> performance on weekly performance log</td>
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<td></td>
<td>▪ <strong>Initiate</strong> performance discussions with team captain and coach</td>
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<td></td>
<td>▪ <strong>Determine</strong> development needs and <strong>propose</strong> ideas to coach</td>
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<td></td>
<td>▪ <strong>May participate</strong> in OSS work groups</td>
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<td></td>
<td>▪ <strong>Attend</strong> daily Team Stand Up</td>
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Agenda

Communications & Training
Communications & Training

OSS associates receive center communications and have access to training and employee development opportunities.

**Internal Communications**
- Town Hall
- Newsletter
- Interior signage (e.g., bulletin boards, flat screen monitors)
- OSS SharePoint
- Recognition and Celebration program

**Training and Employee Development**

**On-boarding**
- **Culture**
  - Service First
  - Continuous Improvement
- **Process**
  - Contact Center
  - Finance
- **Systems**
  - Customer Relationship Management (CRM)
  - Enterprise Learning Management
  - Financials

**Ongoing Learning and Development**
- Provides an end-to-end process perspective
- Integrates into the performance management process
- Offers an opportunity to acquire skill blocks
- Provides leadership opportunities
  - Team lead position
  - Work groups
Agenda

Performance Management
OSS Center Performance

Center performance is measured by adherence to service level agreements (SLAs). An SLA is an agreement between OSS and each partnering agency that defines the services OSS will deliver and clarifies the split of responsibilities and commitments between parties.

Service Definition
What services OSS provides

Service Review
Review of service delivery to ensure expectations are met

Service Level Agreement*
How well OSS delivers the services it commits to provide

Performance Reporting
Overview of performance using KPIs**

Performance Measurement
How well OSS delivers the services it commits to provide

* See Appendix: OSS SLAs
** KPIs: Key Performance Indicators
OSS Individual Performance

Ohio Shared Services center performance and mission accomplishment depend on the performance of all employees.

**OSS Mission**

**Strategic Objectives**
- Excellent Value and Service to Customers
  - Efficient and Effective Operations
    - Focused continuous improvement
    - Standardized high quality services
  - Highly Motivated and Top Performing Workforce
    - Satisfied OSS associates
    - Highly productive workforce
  - Cost Competitive Service Provider
    - Rigorous cost management
- Critical Success Factors
  - Examples:
    - % SLA Targets Met
    - Partner Satisfaction %
    - CI Project Savings ($)
    - Associate Satisfaction %
    - Transactional Volume / FTE
    - Managed and Un-managed Turnover %
  - Organizational KPIs
    - Examples:
      - Average speed to answer
      - Abandonment rate
      - Schedule adherence
      - Associate satisfaction %
    - Individual and Team KPIs
      - Cases resolved

Examples:
- % SLA Targets Met
- Partner Satisfaction %
**Performance Management Overview**

**Strategy**
- Establish a culture of teamwork and high-performance
- Design adaptable support tools to meet OSS performance management needs

**Ongoing**
- Review and ensure understanding of associate competencies and target results
- Receive recognition for outstanding individual and team performance
- Seek development support

**Ongoing**
- Seek timely and relevant performance feedback for myself and team
- Use data and observations to identify personal strengths and areas for improvement
- Build my learning and development plan

**Monthly / Quarterly**
- Discuss my performance with my coach and seek his or her input
- Lead my quarterly review with my coach
- Agree on concrete steps to continue my learning and development
Appendix

- OSS Competency Model
Appendix: OSS Competency Model

- Acts Decisively
- Manages with Vision & Purpose

- Measures & Assures Outcomes
- People Development

- Communication
- Self-Development

- Professional

- Core

- Technical

CUSTOMER SERVICE
EMBRACE CHANGE
OPERATIONAL EXCELLENCE
TEAM FOCUS

ASSOCIATES
- OAKS
- "The Source"
- SharePoint
- Process Management Center

ANALYSTS
- Continuous Improvement
- Data Analysis
- Financial Reporting

COACHES & LEADERS
- Business Transformation
- Customer Relationship Management
- Project Management
- Service Management
- Associate Technical Competencies