



OUR JOURNEY TO EXCELLENCE



Genevieve Cavallo, Business Analyst II





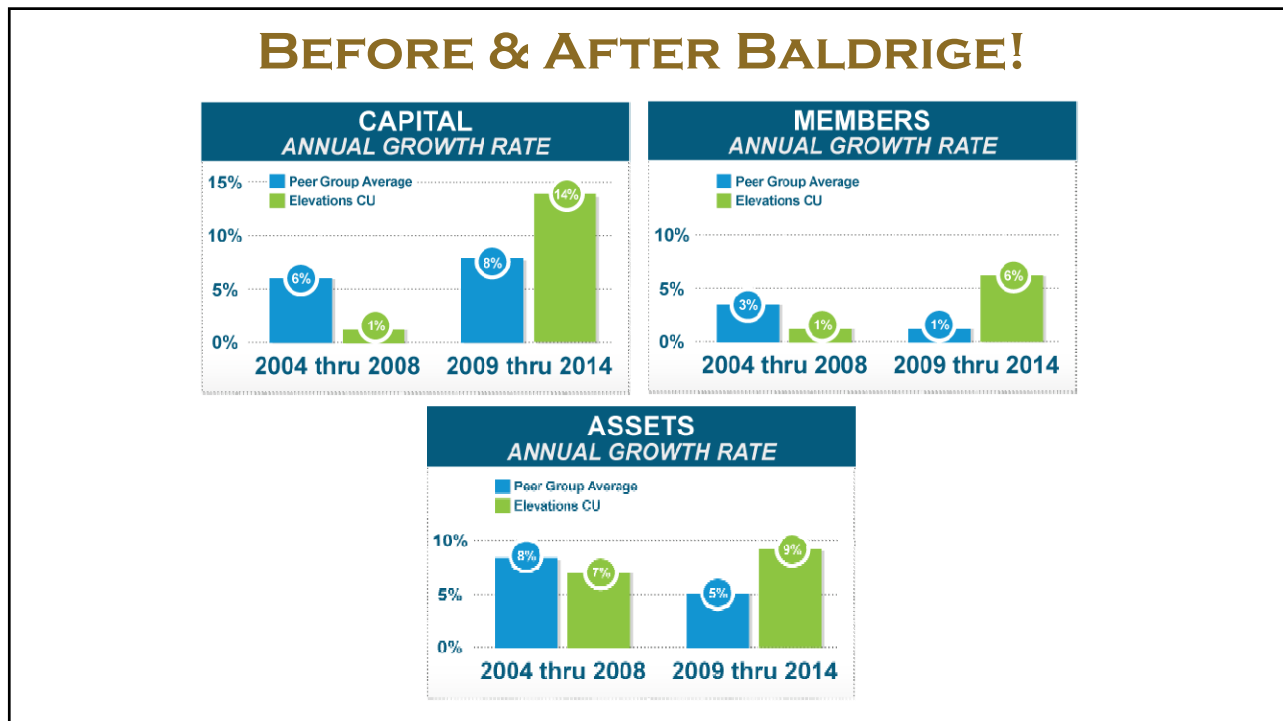
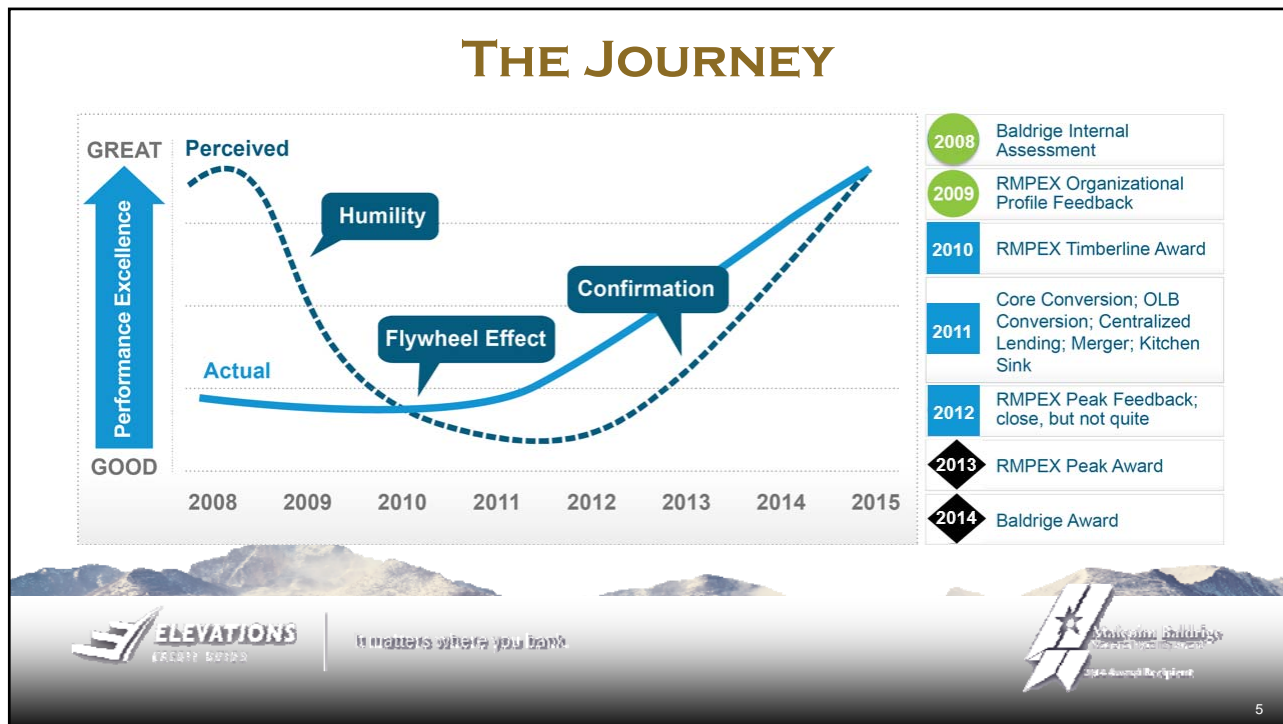
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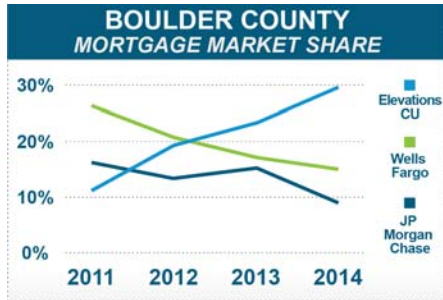



SETTING THE GOAL

GREEN / BEGINNER

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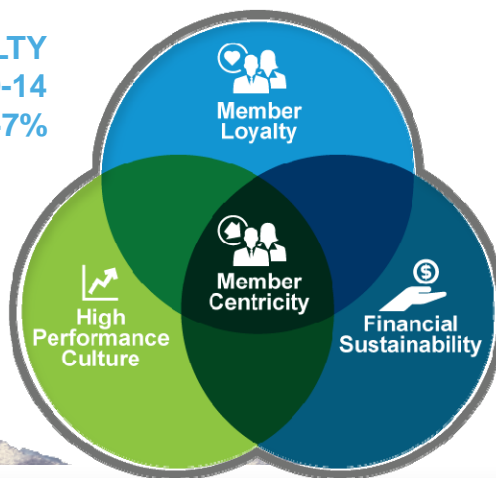
REVENUE STRENGTHENING, DIVERSIFICATION



RESULTS OF A WINNING STRATEGY

MEMBER LOYALTY
2010-14
+7%

EMPLOYEE ENGAGEMENT
2009-14
+13%




ASSETS
2009-14
+56%

NET WORTH
2009-14
+79%




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CREDIT UNION

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Malcolm Baldrige
National Quality Award
2014 Award Recipient

EPM & BPM

BLUE / INTERMEDIATE



APQC = BPM FOUNDATION



WE RESEARCH
We research best-practices from leading organizations around the world.



WE SHARE
We share these findings with our members.



WE CONNECT
We connect our members to each other so they can share and learn.

Why APQC matters to us:

- We had no idea where to begin
- Helped us align our organizational work with value stream concepts and proven work in Performance Excellence
- Helped us teach the organization where we were trying to go



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APQC FRAMEWORK + INTERNAL ASSESSMENT

= GOT PROCESS?



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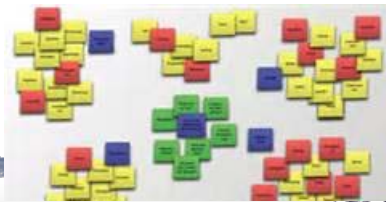


SURVEY = LEVEL SET START

87% survey respondents reported they conduct their work without a documented process

Why the "Got Process" survey mattered to us:

- Level playing field
- Gaps became evident
- Awareness across the organization



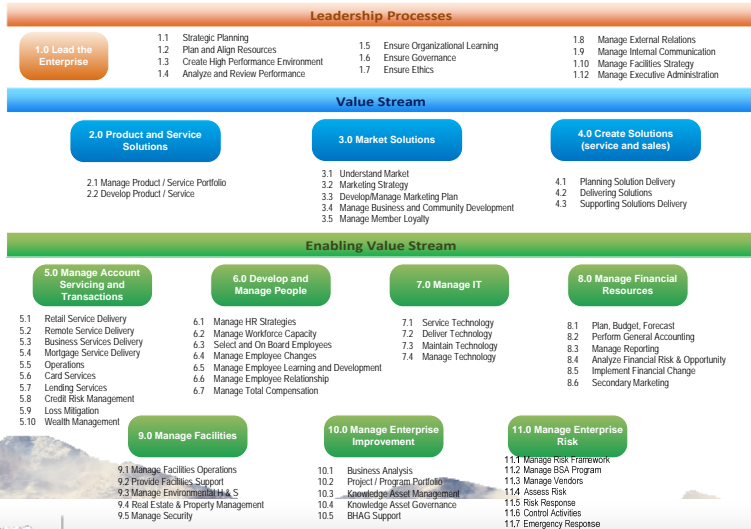
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PROCESS TRAINING



ENTERPRISE PROCESS MAP



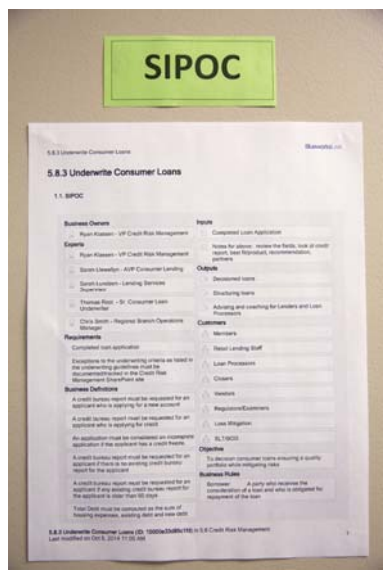
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ENTERPRISE PROCESS MAP BUILDING = SIPOCS

Objective
Suppliers
Inputs
Process
Outputs
Customer
Requirements
Measurements



BPM TRACKER



Enterprise Process List - Progress Schedule

Process	Process Owner	Phase	Designing	Developing	Deploying	Monitoring	Measuring (the Design tag)
11.3.1.1 Investigate Suspected External Fraud	Michael Canabur	Designing	█				
11.3.1.2 Investigate Suspected Internal Fraud	Michael Canabur	Designing	█				
11.3.1.3 Manage Fraud Cases	Michael Canabur	Designing	█				
11.3.1.4 Respond to Suspected Check Kiting	Michael Canabur	Designing	█				
11.3.1.5 Reporting Suspected Elder Abuse/Negligence	Michael Canabur	Designing	█				
11.3.1.6 Process Bond Claims	Michael Canabur	Designing	█				
11.3.1.7 Manage Escalated Disputations	Michael Canabur	Designing	█				
11.3.1.8 Respond to Privacy Incident	Michael Canabur	Designing	█				

* Note: please link each process # to the # assigned in Elevations

Why the BPM Tracker matters for us:

- Needed to keep a line of sight with the SIPOCs
- Needed to identify and track process owners and Stakeholders
- Needed an easily accessible tool for multiple process owners
- Needed a uniform approach (methodology) for all process owners



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BPM WORKBOOK



Business Process Workbook

Enterprise Performance Excellence

Section 1

Building a Process

Create consistency of purpose for the improvement of product and service, with the aim to become competitive, stay in business and provide jobs. – Dr. Edward Deming

To understand process improvement requires you to think of all processes within the organization linked together as a system. Each process is tied to other processes through inputs and outputs, all for the purpose of providing service and products to our members.

What is a process? A process is a series of steps/tasks that when combined produces an output (result). It includes the business tasks, by role, required for the organization to respond to an operational event with a defined beginning and end.

1 How to select your process



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KNOWLEDGE MANAGEMENT



BLACK / ADVANCED

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 **Atalente Baldrige**
National Quality Award
2014 Award Recipient

BlueworksLive Getting Started Community Library

Process made simple.

- › Collaborate across teams.
- › Capture process knowledge.
- › Analyze and improve your business.

Overview Features Resources Success Stories

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VIRAL PROCESS COMMUNITY

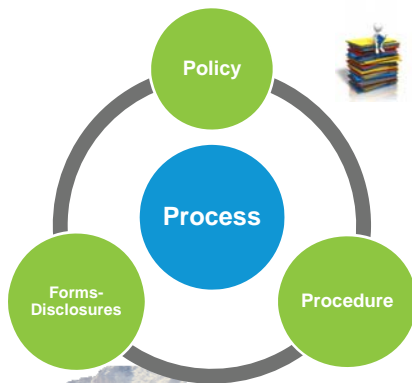
The screenshot shows a detailed process diagram for 'Initiate a Consumer Loan'. The process starts with 'EPDC' and 'Process New Application'. It includes decision points for 'Current Member?', 'Initiate Loan?', and 'Pre-qualified Applicant?'. Key steps include 'Start the Application', 'Verify Credit Report', 'Choose Product', 'Disburse Payment', and 'Adding Comments'. A user comment from Alicia Hoelgen is visible, stating: 'Alicia Hoelgen: Hi, Loral - has been stuck and what is currently working on here. Alicia Hoelgen: See Process 5.1.2 Processing Withdrawals or Loan Advances. Please enter it and message. Send link to this page.'

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GOVERNANCE = PROCESS STABILITY



Welcome to the Elevations CU Reference Desk

The Reference Desk site is the central repository for knowledge assets of the Credit Union.

Governance = Truth
Source of = Reference Desk
Center = Process

- Business Process & Procedures
- Forms, Notices, Disclosures, Letters
- Management Policies
- Board of Director Policies



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PROCESS RESULTS

Before Process	After Process	Quantifiable Improvement
30 day average funding of home equity loans	14.5 day average funding of home equity loans	51% reduction in time from loan application to funding
11.5 day average funding of vehicle loans	4.5 day average funding of vehicle loans	60% reduction in time from loan application to funding
175 loans per underwriter / month capacity	300 loans per underwriter/ month capacity	71% increase in loans handled per underwriter



APRÈS SKI

We'd love to share more, please ask!

elevationscu.com/baldrige



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