



REGIONAL FORUMS for SENIOR IT LEADERS

CIO

PERSPECTIVES



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CIO Executive Council
Leaders Shaping the Future of Business



Transform While You Perform: A CIO's Insight Into Accelerating Business

Maryann Goebel
EVP and CIO, Fiserv

Fiserv is the leading provider of financial services technology solutions to financial institutions and businesses worldwide



Payments

Solutions for optimizing all aspects of the payments mix to help create efficiency and drive growth



Processing Services

Solutions for managing account-based transactions reliably and securely



Risk & Compliance

Solutions for proactive risk prevention and mitigation



Customer & Channel Management

Solutions for attracting, retaining and growing customer relationships



Insights & Optimization

Solutions that help transform data from information to actionable business insights

We apply our strategic competencies to our clients' business challenges, with more than 600 products and solutions to offer



Privileged Client Relationships

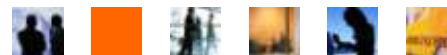
26 years of experience

16,000 clients worldwide

Relationships with all of the top
100 U.S. financial institutions

1 in **3** U.S. financial institutions rely on
Fiserv account processing solutions

61% of consumers using third party
online banking are powered by Fiserv



We operate a very high transaction volume environment



\$4.13B 2010 annual revenue

19,000 associates worldwide

\$1 Trillion moved

17 Billion digital payment transactions

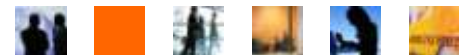
1.4 Billion online bill payments

#1 online banking provider

330 Million e-bills delivered

8.8 Billion ATM/debit transactions

U.S. market **leader** in ACH



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The Fiserv mission is to provide integrated technology and service solutions

Our Vision

To be a global leader in transaction-based technology solutions

Our Mission

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

Our Values

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

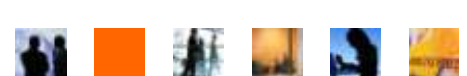


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The Fiserv mission of integration created the need for our Enterprise Technology Group (ETG)

- Corporate history is one of acquisitions
- Very good quality, client service and support
- Decision reached to change from a *holding company* business model to an *operating company model*
 - From independent business units to interdependent business units
 - From independent products to integrated product suites
- Enterprise Technology was one of the first groups formed to serve all of Fiserv

The need for “transforming while performing” was created



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ETG's mission is to provide integrated technology platforms that enable the success of Fiserv and our clients

Our Vision

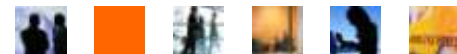
To be a global leader in transaction-based technology solutions

Our Mission

To provide the integrated technology platforms that enable the success of Fiserv and our clients

Our Values

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



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4 core principles of operational excellence drive our actions: consistency, repeatability, predictability and measurability

1. *Consistency in defining* the processes for operating our Enterprise Technology Group functions across the enterprise
2. *Repeatability in executing* the processes to fulfill the scope of our responsibilities, enabling predictability in setting and meeting their targets for performance
3. *Predictability in achieving* expected results as evidenced by meeting or exceeding the operating targets established with our business colleagues
4. *Accuracy in measuring* the conformance to and results of adherence to our operating processes, and most importantly, identifying the causes of non-achievement of targets, and applying the appropriate corrective actions

Industry insights, best practices and benchmarks are used to set goals, which are tracked via a detailed scorecard organized around 5 critical ETG organizational imperatives

Deliver Strategic Vision

Developing our strategic IT landscape and architecture, our multi-year roadmap and perpetual annual portfolio - all of which are aligned - to the Fiserv business model and business objectives

Achieve Operational Excellence

Making sure that what we have delivered to our clients and colleagues - that they are counting on every day to run their business - works flawlessly, without creating business disruption

Deliver Capability

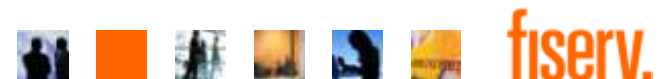
Managing the portfolio process and the delivery of new capabilities to exceed expectations regarding requirements, schedules, quality, performance, cost and value

Demonstrate Financial Stewardship

Meeting or beating the budget in each cost category; improving year over year on spending mix between RUN and BUILD; spending in line with industry benchmarks

Inspire Our Associates

Creating an engaged workforce by providing challenging and rewarding opportunities for professional growth and development



Accelerating business results requires IT to transform while it performs. It's about changing beliefs and behaviors.

- **Performing is the price of entry**
- **Transformation must be run as a formal project**
- **Stakeholder support is essential**
- **Managing the journey requires skill and focus**
- **Communication is key**
- **Maintain high level visibility**



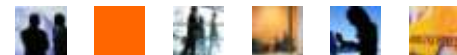
First, make sure you can perform

- **Establish a baseline**
 - Listen and learn the pain points
 - Examine the workflows
- **Mobilize for success**
 - Organize around the work and the clients... not individuals
 - First to perform
 - Then to transform
- **Put the right leaders in place**
 - Who can both perform and transform
 - Or have a plan to address in a timely manner
- **Start with a few meaningful, actionable metrics**
 - Establish credibility
 - Create a base and continuously improve



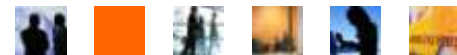
But don't wait too long to start planning the transformation

- **Create a clear vision of the end state**
 - A picture is worth 1,000 words
 - If you don't know where you're going, you'll never get there
- **The roadmap is even more important than the vision**
 - Everyone can tell you why you need to change
 - Everyone can buy into the perfect end-state
 - But, without a roadmap, few can see how to get from here to there
- **The benefits must be compelling**
 - The risk associated with transformation is often high
 - The “prize” needs to keep people going when the going gets tough
 - People related activities need to be on the roadmap too
 - All stakeholders want to know: “What's in it for me?”
- **Manage as a formal program**



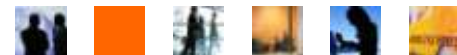
You'll need all the support you can muster...and then some

- **Start with your staff**
 - You need more than their buy-in... they need to “own it”
 - They must share your passion and share the vision
 - You'll need to keep each other motivated along the way
- **Your peers and your boss must be on board before you start**
 - Do a stakeholder analysis
 - Get organized: you have only one shot to make a first impression
 - Ask for their support and align objectives
- **Persistence is a highly underrated skill**
 - The bigger the transformation, the more the questions
 - Have one more answer than there will be questions



Communication is key

- **Be transparent**
 - Associates want to know: “What’s in it for me?”
 - You can’t repeat the messages too often
 - Manage expectations
- **Form a Transformation Team**
 - Influential leaders and individuals from within the organization
 - Two-way dialogue
 - Improves credibility within the organization
 - Is a great way to keep a finger on the pulse of the organization
- **Engage professionals and other functions**
 - Transformation is an enterprise activity
 - It’s a new way of thinking and a new way of doing



Some final critical success factors

- **Keep the spotlight shining on the transformation**
 - Establish governance and use it
 - Keep executive management engaged to prevent transformation from becoming “just another project “
- **Celebrate successes**
- **Have confidence, but not arrogance**
 - Listen
 - Acknowledge risks and problems
 - Identify mitigation plans and solutions
- **Believe and be persistent... the rewards are immense**



This is the new normal.

Change is the only constant.

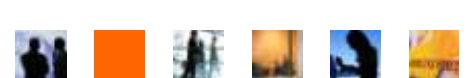
Transforming while performing is a must.

Questions?

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Thank You!



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