

## **Finding the Recipe for Digital Workplace Execution: Transforming Employee Experience**

**Douglas Pamplin**

Managing Director, BNY Mellon

[douglas.pamplin@bnymellon.com](mailto:douglas.pamplin@bnymellon.com)

---

### **Session Description**

Prepare to transform your employee experience through the digital workplace! This session will open your eyes to the importance of a more consumerized work environment and show you how this new business strategy is revolutionizing the way we boost employee agility and engagement. Join us and find out how you can drive this cultural change through the expansion of the IT charter, which in turn produces greater transparency, less employee friction, and ultimately, better business outcomes.

### **Speaker Background**

Douglas Pamplin has twenty-five years of customer service and support experience, and is currently the head of BNY Mellon Digital Service Desk Operation. At BNY Mellon, he has been responsible for designing and creating the DWT End-User Profile system, introducing Live Chat, Virtual Hold, and Level 1 and 2 Service Support Structures, and bringing APAC under a single senior manager for digital workplace technology. Prior to assuming his current role, Douglas held various senior roles in the transfer agency business Shareowner Services.

# HDI<sup>®</sup> 2017

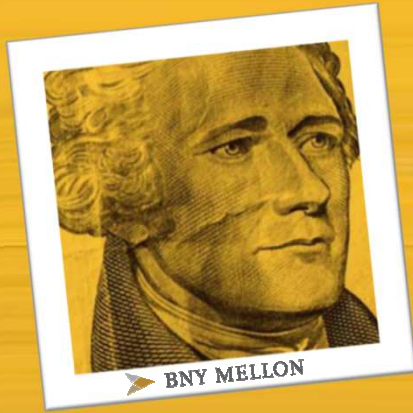
## CONFERENCE & EXPO

CONNECTING  
THE WORLD  
OF TECHNICAL  
SUPPORT

#HDIConf

# Finding the Recipe for Digital Workplace Execution: Transforming Employee Experience

Douglas Pamplin



## Agenda

- Innovation Center
  - How to boost employee agility and engagement through a more “consumerized” work environment
- Context and Opportunity
  - Our Story
- Collaboration
  - Create a more engaging place to work
- Self-Service Tool Set
  - Removing employee dependency on Service Desk assistance by instituting best practices
- Service Owner Partnership
  - Provide transparency and analytics to promote, encourage and foster ownership

## Context and Opportunity

- BNY Mellon is the Investments Company for the World
- Approximately 52,000 associates globally
- Digital Workplace is a business strategy to boost employee agility and engagement through a more consumerized work environment
  - Create a more collaborative and engaging place to work
  - Remove employee friction from common business processes
  - Provide great transparency and analytics
  - Provide a consumerlike environment

# Our Story

## The Buck Started Here

- Started by Alexander Hamilton in 1784, BNY Mellon is one of the longest-lasting financial institutions in the world. We have endured, been innovative and went on to prosper through every economic event and market move over the past 232 years.

## Company Profile

- BNY Mellon is an investments company. We provide investment management, investment services and wealth management that help institutions and individuals succeed in markets all over the world.



**\$29.9**

trillion assets under  
custody and/or administration \*

**\$1.6**

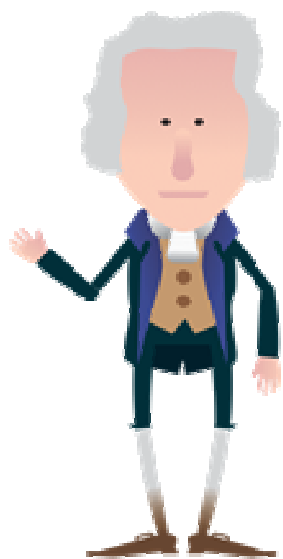
trillion assets  
under management \*

Markets served:  
Countries:

**100+**  
**35**

*\* All figures as of December 31, 2016*

# What is Digital Workplace Technology?



Alexander  
Hamilton



Andrew  
Mellon

# Digital Workplace in Action

## Consumer-oriented Styles

- MySource Social
- Bring Your Own Device (BYOD)
- Flexible Work Arrangements

## Employee Engagement

- Innovation Centers
- Work Out Loud
- Award Recognition

## Digital Workplace Technology

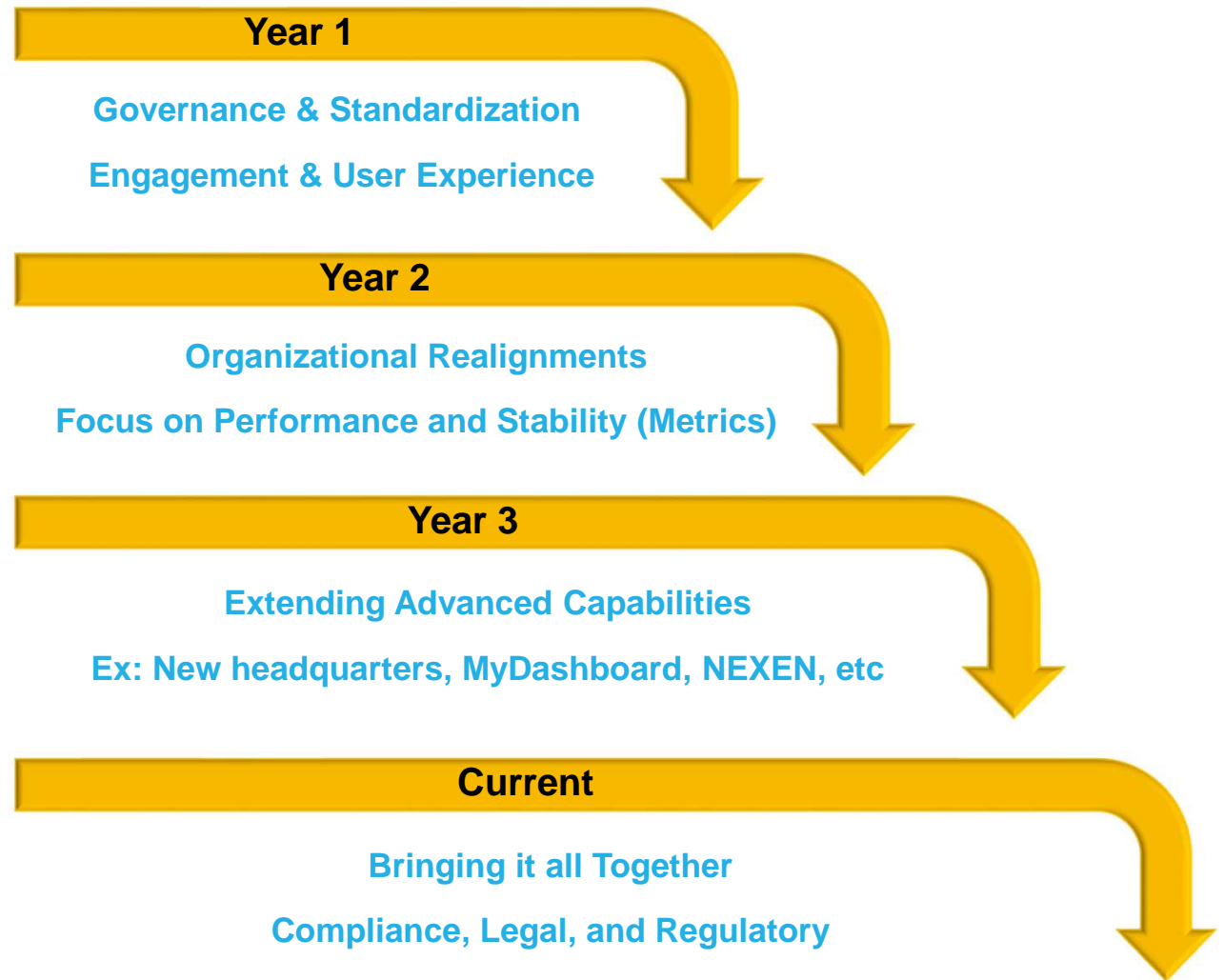
The Digital Workplace enables new, more effective ways of working; raises employee engagement and agility; while exploiting consumer-oriented styles and technologies. The digital workplace is the collection of all of the digital tools provided/allowed by an organization/employee to do their jobs.

## Digital Tools

- MyDashboard
- Self-help Password
- VOIP
- MyApps (self-service)
- Digital Document Repository
- Video Conference



## Our Approach



# Our Digital Workplace at BNY Mellon

## Brand

**Mission Statement:** Transform our worldwide employees' workplace experience with the digital solutions necessary to be productive, knowledgeable and engaged, helping them to deliver exceptional service to our clients and partners.

- **Slogan:** E<sup>4</sup> Engage, Enable, Empower, Educate
- **Warranty:** Digital Workplace 8-Point Pledge
- **Sponsor:** CIO

## Key Principles

- Simplicity of solutions
- High quality and on-time features
- Automated product releases
- Consistency
- Ease of use & predictable experience
- Modular, reusable, flexible, reliable, with long-term agility
- Standard APIs & interfaces to ease integration
- Standard and automated testing

## Portfolio Themes

- Work Out Loud
- Branding
- Innovation
- Reduced Risk
- Cloud Enablement
- Change Agent
- Business Alignment
- User Profiles

## The Recipe for Execution

### 1. Plan

- Understand employees' needs
- Partner with other business units

### 2. Build

- Rethink the service desk
- Create a marketing or branding campaign

### 3. Run





- Capture quick and highly visible wins
- Drive quality and execution
- How can we help you

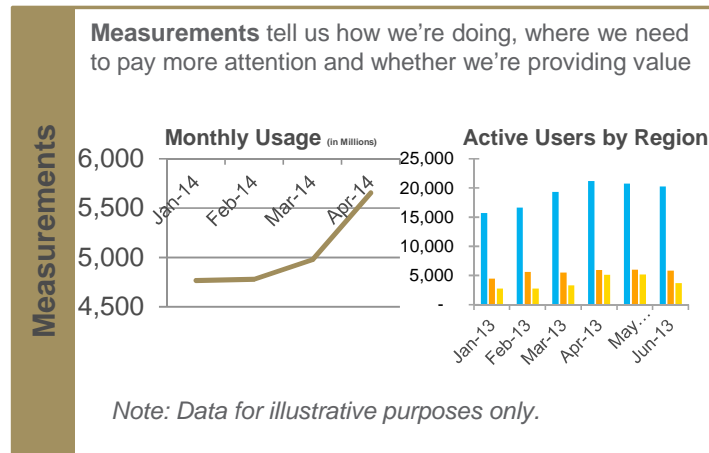
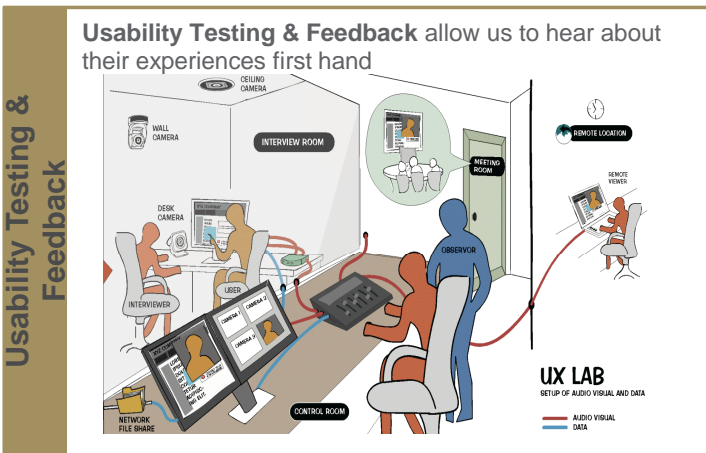
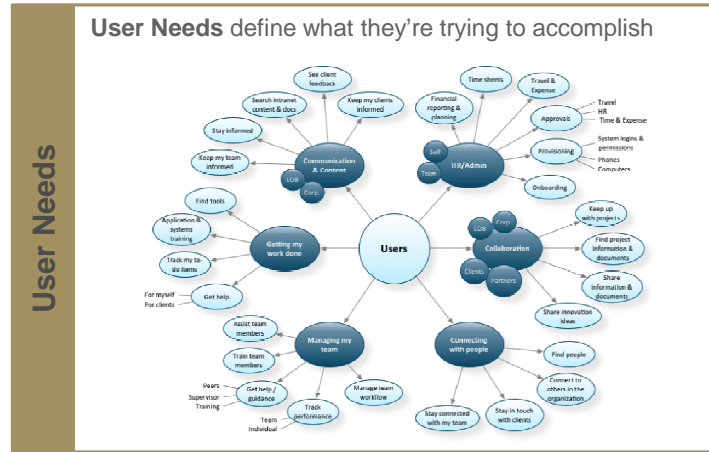
## Step 1: Plan

- Understand the needs of employees to help focus digital workplace priorities
- Include non-IT business units in the digital workplace effort
- Incorporate employee input into how IT services are planned and delivered
- Determine what consumer-oriented technology should be introduced to drive cultural change

# Plan: Key Artifacts

**Personas** define who we're designing for and what their motivations are

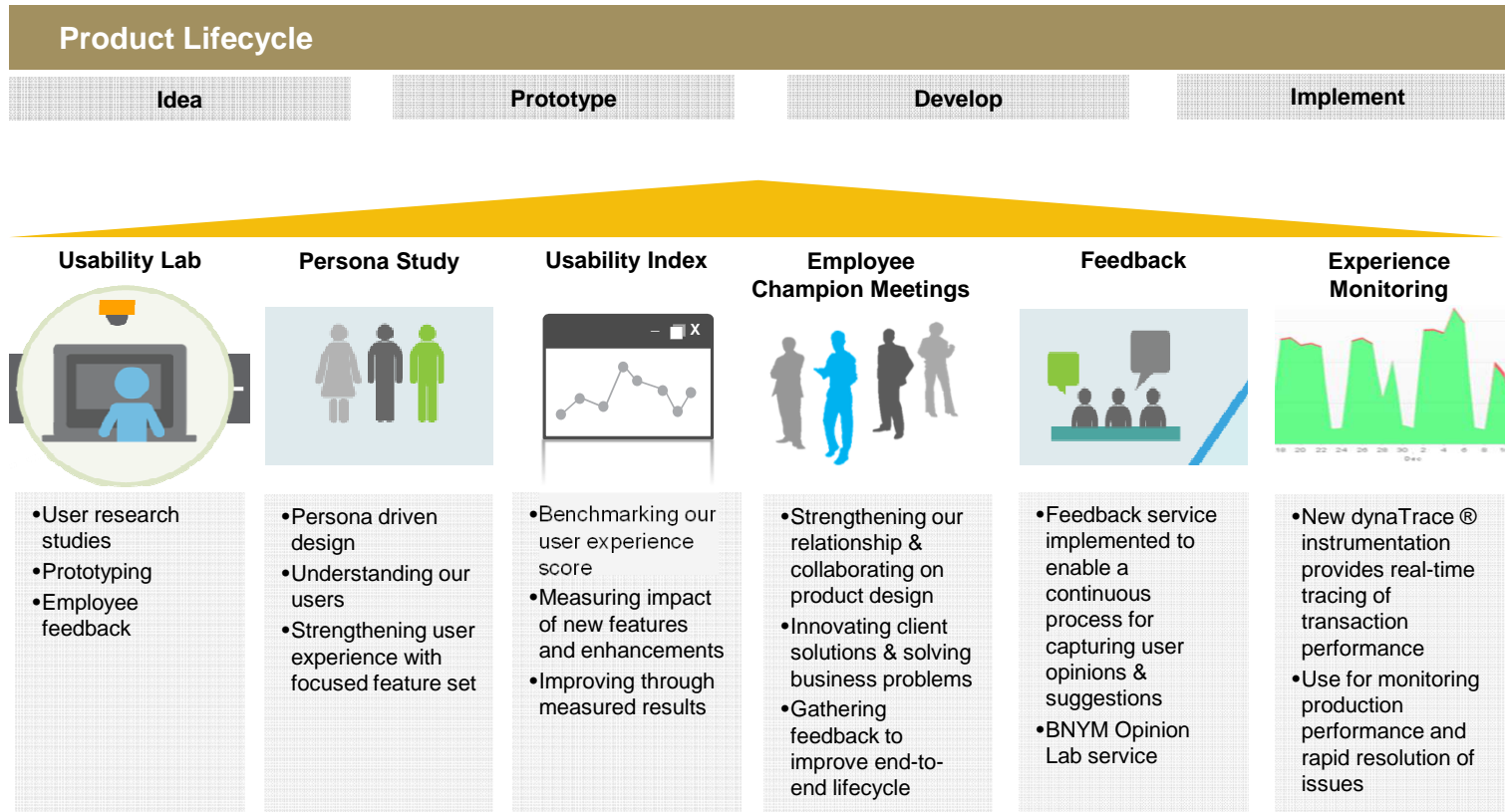
Justin 	Raj 	Lisa 	Robert 
<b>New Employee</b> <i>Digital Native</i>	<b>Client-Facing Traveler</b> <i>Knowledge Seeker</i>	<b>Multi-Office Manager</b> <i>Knowledge Sharer</i>	<b>Organization Veteran</b> <i>Inside Expert</i>
<ul style="list-style-type: none"> <li>Young, high expectations around technology</li> <li>Accustomed to self service</li> <li>No legacy brand associations</li> </ul>	<ul style="list-style-type: none"> <li>Needs to find information across the organization</li> <li>Often away from office</li> <li>High mobile needs</li> <li>Quick to try, adopt new technologies</li> </ul>	<ul style="list-style-type: none"> <li>Coordinates teams across several locations</li> <li>Multi-tasker, values productivity tools</li> <li>Often works from home or remote offices</li> </ul>	<ul style="list-style-type: none"> <li>High level of institutional knowledge</li> <li>Potential source of ideas for improvements</li> <li>Resistant to change</li> </ul>
Technology Adoption	Technology Adoption	Technology Adoption	Technology Adoption
Mobile Use	Mobile Use	Mobile Use	Mobile Use
Content Creation	Content Creation	Content Creation	Content Creation
Content Consumption	Content Consumption	Content Consumption	Content Consumption
Content Sharing	Content Sharing	Content Sharing	Content Sharing
Organizational Knowledge	Organizational Knowledge	Organizational Knowledge	Organizational Knowledge



## Step 2: Build

- Create a digital workplace brand and marketing program to communicate benefits, solicit feedback and increase adoption
- Governance (Steering Committee, Advisory Board, Champions Network)
- Establish KPIs (performance, adoption and usage, customer satisfaction)
- Introduce service culture

# Build: Product Lifecycle



## Step 3: Run

- Use a digital workplace initiative to drive long-term cultural change in the workplace
- Make the service desk one of the focal points of the digital workplace
- Make the connection between physical workplace and cultural change
- Use re-engineering, self-service, real-time analytics to improve experience



# Run: Engagement

## Digital Workplace Webinars

- To raise awareness and usage of DW solutions
- All employee
- Topics have included:
  - Email Best Practices
  - Audio Bridge Best Practices
  - Collaboration 101



## Work Out Loud

- Inspired by the Work Out Loud movement
- Staff are encouraged to work out loud on MySource Social
- Posting information about their work and tagging others

## Ask Me Anything (AMA)

- Sessions similar to Reddit® forums
- Asynchronous sessions between staff and senior leaders
- Staff post questions and can up-voted
- Executives reply, for all to view



## Digital Cafés

- In multiple locations globally, including a virtual option
- Analogous to Apple's "Genius Bar"® concept

## Recurring Engagement Activities

- Regular presence at key internal forums including:
  - Senior executives & Chief Administrative Officer (CAO)
  - Business Town Hall events
  - Internal TechExpos
  - Innovation Center Knowledge Series

## Open Door Sessions

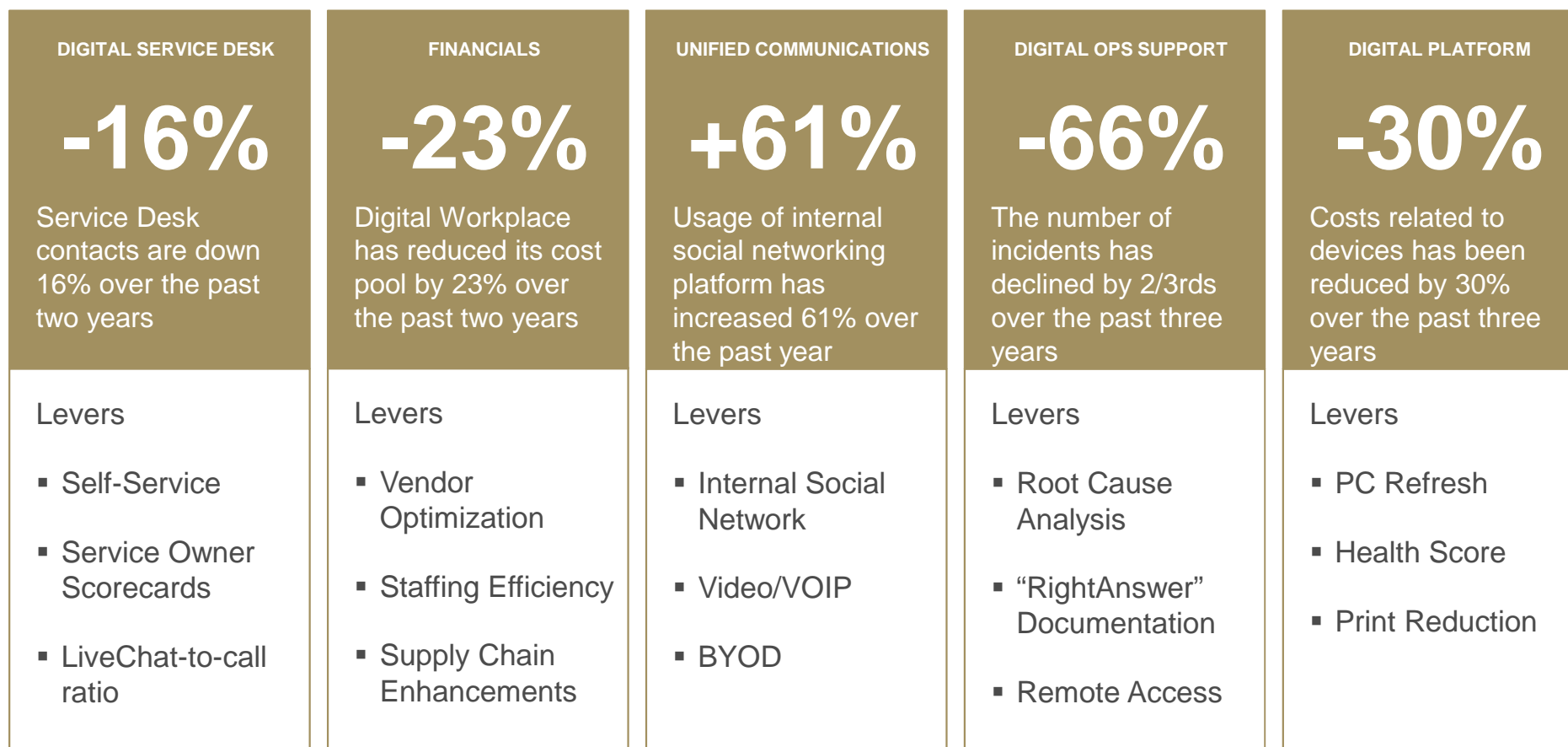
- Informal collaborative sessions via Skype® video
- Connects all global staff with DW leadership

## Digital Workplace Champions and Ambassadors

- Global network of 500+ employees outside technology - who educate peers on DW solutions
- Each ambassador oversees ~10 champions and coordinates local events
- Monthly "challenges" to earn points on our internal social networking platform, MySource Social



## Results to Date



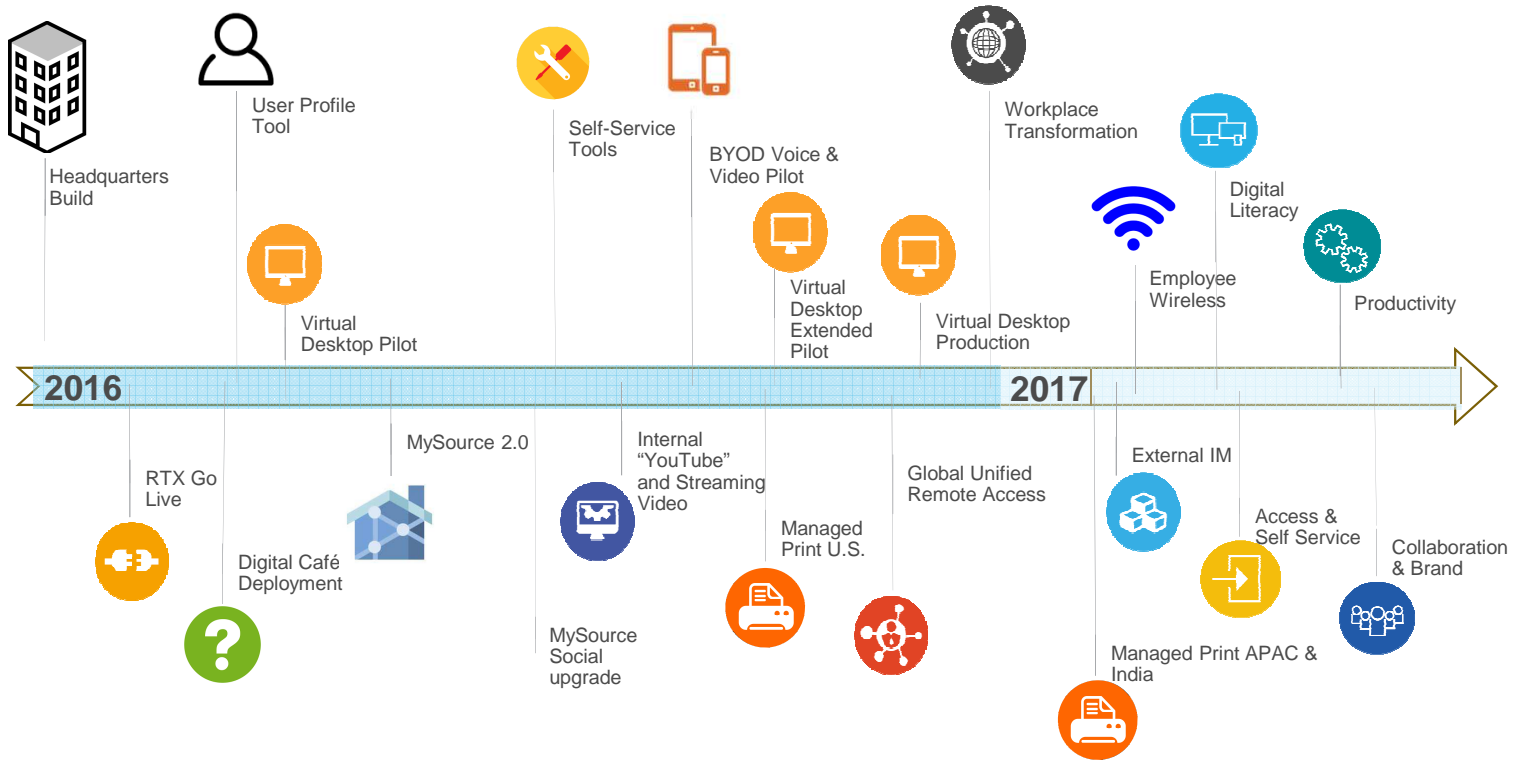
\* All figures as of December 31, 2016

## Ongoing Evolution

- Portfolio Management via a Predictable Feature Release Program (PFRP)
  - Piloted 90-day cycles for releasing 50-70 features
  - Focus shifting to standardization and repeatability
- Evolution from a focus on infrastructure to development
  - Infrastructure stabilization nearing completion, successes continue to evolve (user profile tool for Digital Service Desk staff and MySource Social mobile app)
- Industry Recognition
  - Digital Workplace Group (DWG) recognized our Digital Workplace as #1 in overall maturity, compared to industry peers

# Roadmap and Next Steps

- Defining Service Ownership
  - Org Alignment in APAC
  - Aligning UX, Real Estate and Communications Teams
  - Employee Engagement
- 
- 2013-2015**
- Single Sign-On
  - Wi-Fi
  - Internal Social Network
  - Bring Your Own Device
  - Replatforming
  - Remote Access



## Our Digital Transformation for Employees

### **EMPLOYEE EXPERIENCE**

Seamless multi-channel password reset experience whenever, wherever service propositions

### **PRODUCT & SERVICE INNOVATION**

Envision – Proactive system that allows the Service Desk to have more information at point of call

### **MULTI – TIER SERVICE DESK SUPPORT**

Two levels of SME Support - Level 1.0 and Level 2.0

### **GLOBAL SERVICE DESK INTEGRATION**

Consistent support by integrating all Service Desks

### **CENTERS OF EXCELLENCE**

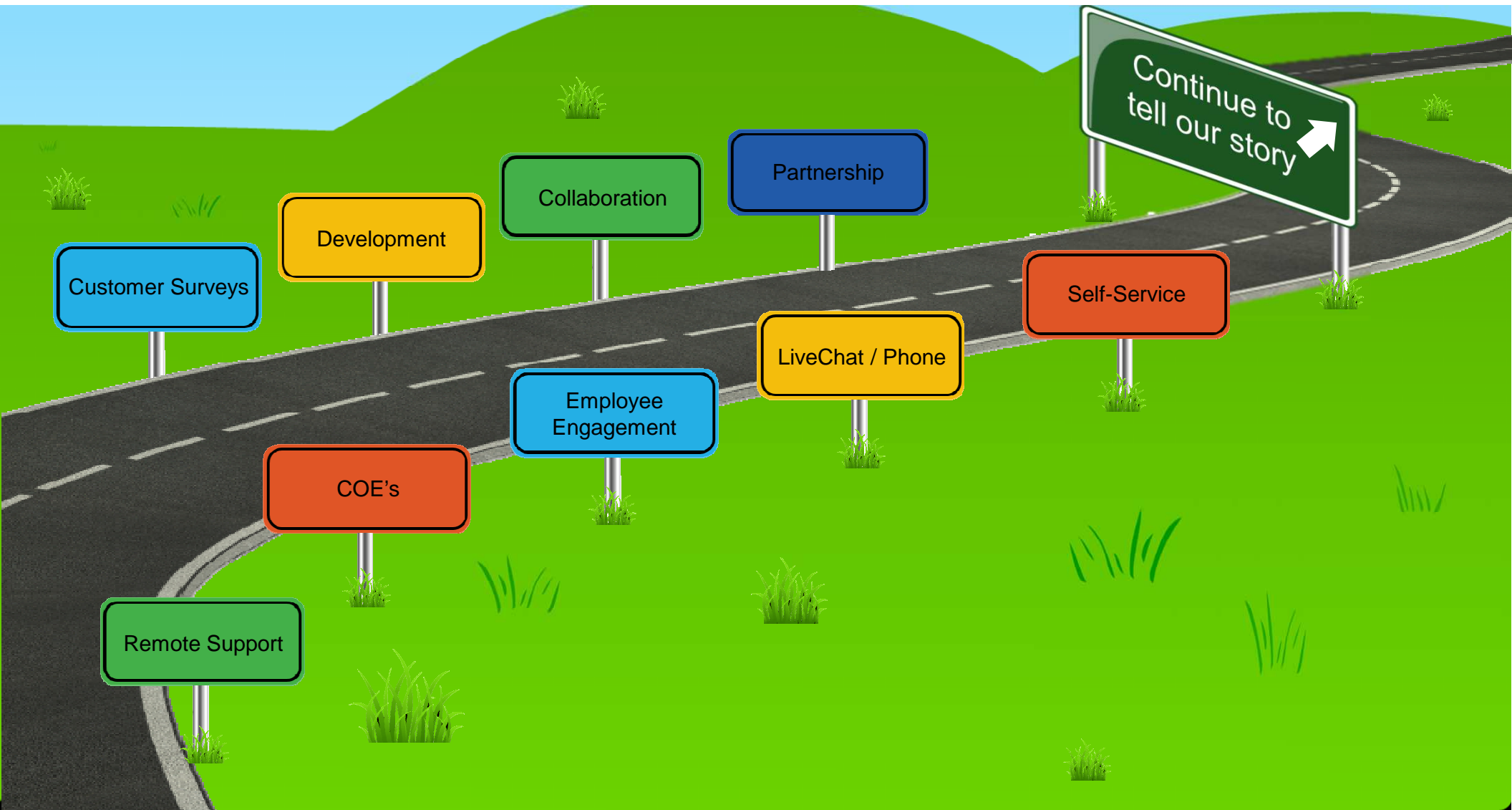
Empowering management to focus on firm aspects

### **COLLABORATION**

Leveraging internal social media to institute ideas of the employees to improve procedures

## **8 Point Pledge to BNY Mellon Employees, our Customers**

- 1. RESPECT FOR OUR CUSTOMERS' TIME**
- 2. STAND BEHIND OUR SERVICES AND PRODUCTS**
- 3. PROVIDE EXPERT SERVICE AND SUPERIOR PRODUCTS AT TRANSPARENT COST**
- 4. PROACTIVE AND FREQUENT COMMUNICATION**
- 5. TRANSPARENT PERFORMANCE MEASUREMENTS**
- 6. SOCIAL COLLABORATION AND INNOVATION**
- 7. TEACH YOU TO HELP YOURSELF**
- 8. LISTEN TO OUR CUSTOMER**

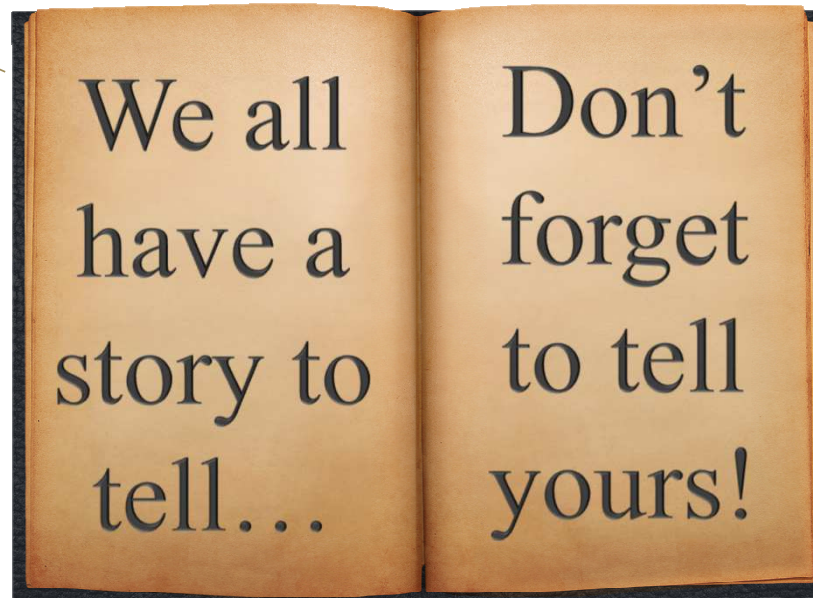


## Call To Action

Identify Root Cause & stakeholders

Identify challenges

Identify best communication tools



Obtain buy in from your customers

Work Out Loud

Establish Your Market

... Brand

... Values

... Recommit to Customer Services

... Celebrate small victories



## In Closing.....

You Don't Have to Reinvent the Wheel...Just Polish It Up Bit



BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation and may be used as a generic term to reference the corporation as a whole and/or its various subsidiaries generally. Products and services may be provided under various brand names in various countries by duly authorized and regulated subsidiaries, affiliates, and joint ventures of The Bank of New York Mellon Corporation. Not all products and services are offered in all countries.

This material may not be comprehensive or up to date and there is no undertaking as to the accuracy, timeliness, completeness or fitness for a particular purpose of information given. The views expressed herein are those of the author and not necessarily those of BNY Mellon. BNY Mellon will not be responsible for updating any information herein, which is subject to change without notice. BNY Mellon assumes no direct or consequential liability for any errors in or reliance upon this material.

© 2017 The Bank of New York Mellon Corporation



BNY MELLON

| Invested

Thank you for attending this session.

Please complete the short evaluation for this session.