

## AEA Federal Credit Union realizes significant time and cost savings with PerformancePro

*Automated employee performance management system pays for itself in four months*



Yuma, Arizona-based AEA Federal Credit Union has 162 employees and seven branches spread across Yuma and LaPaz counties. AEA FCU was first established in 1942 to serve educators and teachers but has since grown to serve the financial needs of all Yuma county residents. After 63 years of success and expanding growth the credit union's human resources department had found that its manual process of documenting and conducting employee performance evaluations was cumbersome, slow and ineffective.

AEA FCU Human Resources Director Richard Hain recalls the situation upon first joining the credit union; "Historically, all employee performance appraisals were documented manually using a 13-page set of pen and paper forms. I heard loud and clear from both managers and employees that the pen and paper system was ineffective and a waste of time. We needed a new system that would save time and result in a program that actually improved individual performance and overall company efficiencies."

### Needs Analysis

According to Hain managers were frustrated over the amount of time spent documenting each employee performance appraisal using the paper templates. The inefficiency was further compounded by HR staff spending significant time administrating, processing and filing the stacks of paperwork.

Initially Hain began evaluating possible Employee Performance Management (EPM) solutions by talking with industry associates and HR consultants. It was through a referral by a representative of a competitor product that Hain first heard of HRN Management Group and a product called Performance Pro Online.

Hain recalls, "As we discussed our requirements and desire to use the latest Internet technology to automate the process, the rep acknowledged the limitation of their product and suggested I contact HRN and learn about Performance Pro."

AEA FCU's requirements were perfectly suited to Performance Pro; notably an established list of satisfied clients in the credit union sector, online access, time savings, ease-of-use and demonstrated return on investment.

### Implementation and ROI

Hain was solely responsible for recommending and making the decision to purchase Performance Pro. After attending an online demonstration, he saw for himself how easy the program was to use. He learned about the extensive data security measures and was sold. He made a presentation and recommendation to senior management and the purchase was approved.

Since implementing the system in 2004, which Hain said was very smooth and easier than expected, AEA FCU has nearly completed one annual performance evaluation cycle. Performance is reviewed annually upon the employee hire date so the

performance management process is ongoing. Hain calculated that it would take 6 to 8 months in labor cost savings to recover their Performance Pro purchase investment. "We were thrilled to see that we met our ROI objective in just 4 months! Performance Pro absolutely exceeded our expectations! No question about it." stated an exuberant Hain.

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*"We love this program!*

*Performance Pro has exceeded our expectations in every category—most notably in ease of use and outstanding ROI."*

Richard Hain, Director of HR  
AEA Federal Credit Union

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The Performance Pro implementation process was seamless. An assigned HRN Customer Support Representative worked with the credit union HR specialist to import all the employee data. The president of HRN, Jerry Nelson, came to the client site for a day of staff training. Within 60 days of purchase the program was fully deployed and in use.

### Management and Employee Benefits

The managers were extremely receptive because they were provided with a tool that was easy to use, saved them time, and resulted in motivated, higher performing employees. But more importantly Performance Pro allowed

completion of appraisals and successive merit increases to take place on schedule. Once employees saw meaningful evaluations occurring on time, the result was overall enthusiasm and acceptance of the system. Hain added that the most surprising outcome of the Performance Pro implementation was the significant improvement in employee morale and retention—especially in departments with higher staff to management ratios. Internal HR administration time has also been significantly reduced allowing HR staff to focus on employee needs rather than paper chasing and filing.

### Expert Customer Support

HRN is committed to each client’s complete satisfaction. Customer and

technical support are included in the system purchase further strengthening the overall value proposition. Hain sang praises for the HRN support staff commenting that the service is unbelievable. He always is able to speak to a friendly and knowledgeable person that promptly resolves any issue he encounters.

### Beneficial Features

Among the many powerful features of Performance Pro that the managers at AEA FCU have benefited from most are online access, comment coaching, e-mail alerts, pre-defined performance factors by job description and integrated HR forms. The forms feature documents achievements, incidents and

corrective actions directly into the employee performance history record.

AEA FCU looks forward to a long-term future and success with Performance Pro. ROI will continue to improve in year two with a cost recovery of annual licensing fees to be achieved in merely 2 months. That’s a 50% improvement from the 4 month year one cost recovery mark. That means the system costs them virtually nothing to use for the remaining 10 months of the year. Hain is monitoring retention and attrition rates and expects to see significant improvement in the years ahead that will further bolster company profitability, growth, and an already compelling return on investment.

## Performance Pro Customer Benefit Summary

Customer requirement	Performance Pro capability	Result	Customer benefit
1. Online access	<ul style="list-style-type: none"> <li>Secure hosted 24/7 access</li> <li>Daily data backup</li> <li>Off site remote data co-location</li> <li>Individual level password access</li> <li>Secure administrator level access</li> </ul>	<ul style="list-style-type: none"> <li>Anytime, anywhere online access and convenience</li> <li>Centralized data storage and automatic revision inclusion</li> <li>Customized for needs and culture of each company</li> </ul>	<ul style="list-style-type: none"> <li>No customer IT administration or overhead</li> <li>Individual password protection</li> <li>Increased productivity</li> <li>Expert customer support included in purchase price</li> </ul>
2. Time savings	<ul style="list-style-type: none"> <li>Designed by HR experts to save companies time and money</li> <li>Goal cascading</li> <li>E-mail notification and alerts</li> <li>Global administrator level customization feature</li> </ul>	<ul style="list-style-type: none"> <li>Reduced appraisal documentation time by 50 percent</li> <li>Significantly reduced HR administration time</li> </ul>	<ul style="list-style-type: none"> <li>Increased productivity</li> <li>Appraisals completed on time</li> <li>Improved manager and employee morale</li> </ul>
3. Ease of use	<ul style="list-style-type: none"> <li>Clear, uncluttered interface</li> <li>Simple instructions</li> <li>Chronologically prioritized steps</li> <li>Industry specific content</li> </ul>	<ul style="list-style-type: none"> <li>Fast implementation and deployment (~60 days)</li> <li>Minimal training required</li> </ul>	<ul style="list-style-type: none"> <li>Built-in HR forms protect company from litigation</li> <li>Increased productivity</li> <li>Improved manager morale</li> </ul>
4. Return on investment	<ul style="list-style-type: none"> <li>Complete usage reporting functionality</li> <li>Value priced</li> <li>Free customer support</li> </ul>	<ul style="list-style-type: none"> <li>Exceeded ROI expectation by 40-50%. Achieved cost recovery in 4 months vs. 6-8 as expected</li> <li>In year two, will realize additional 50 percent ROI improvement</li> </ul>	<ul style="list-style-type: none"> <li>Increased productivity and profitability</li> </ul>



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