

## Performance Pro keeps major bank’s employee performance records safe and secure

*Improved performance through effective communication key to success*

### ZIONS BANK®

Headquartered in Salt Lake City and founded in 1873, Zions First National Bank is a subsidiary of Zions Bancorporation which operates more than 400 full-service banking offices and 200 ATMs in Arizona, California, Colorado, Idaho, Nevada, New Mexico, Utah and Washington.

Zions First National Bank employs approximately 2500 staff, in a wide variety of functions, across several western states. Effective human resource management and staff development programs are a strategic component of the bank’s growth and success. In 2002, as Zions presence and workforce expanded, they realized their existing employee performance management process was ineffective and difficult to administer.

#### Needs Assessment

Overseeing the bank’s retail branch division is Executive Vice President LeeAnne Linderman. She recalls, “We were using a pen and paper-based appraisal method that contained redundancies and little usable information. Information was subjective and not quantifiable or consistent from one appraiser to another. We needed a centrally administered system that was accessible across several states, promoted employee development, provided measurable data, and ultimately increased employee and company performance levels.”

Zions key requirements in a performance management system were:

- Ease of use—user friendly
- Confidential, secure online access
- Consistent and fair
- Enhanced review abilities—multiple appraisers, rating comparisons, self appraisal, HR forms integration
- Ease of administration and reporting

Zions contacted HRN Management Group to evaluate the Performance Pro employee management system. Upon viewing a demo and conducting a small beta group, Zions concluded that Performance Pro met their stringent operational, and security criteria.

Ms. Linderman recalls, “What appealed to us about Performance Pro was that it was easy to use and powerful enough to capture quantifiable performance information on each employee that would tie into merit increases, and career path development.”

#### Phased Implementation

The first phase of the Zions implementation was for 2000 employees at the bank’s branch locations across Utah and Idaho. Because Zions utilizes the ‘self-appraisal’ feature of Performance Pro—where in addition to a manager evaluation, each employee evaluates their own performance—all employees received training. Two levels of training were conducted. The first was introductory training for managers and supervisors, and the second was smaller group user-level training sessions.

Bank branches are now on their third annual performance evaluation cycle. Other employee groups are on their

second cycle and some more widely dispersed groups are just deploying this year bringing the total deployment to over 2500 employees companywide.

---

*“Performance Pro has helped Zions become focused on meaningful performance areas across the organization that have resulted in improvements and enhancements to the bottom line.”*

LeeAnne Linderman,  
Executive Vice President,  
Zions First National Bank

---

#### Administrator Benefits

A significant feature of Performance Pro is the ease of use and efficiency of overall system administration. Because Performance Pro is a hosted solution, Zions commits no IT resources beyond access to computer terminals. All hardware, application, security, maintenance and technical support for Performance Pro is completely provided and managed by HRN.

In such a large and dispersed organization, keeping employee data current—whether entering new employee information or transferring staff records from one manager to another—is easy, reliable, and secure.

Ms. Linderman comments, “Logistically training was a challenge

simply due to the size and locations of our many branches and offices. Most people fly through the training and appraisal documentation process. It all depends on how comfortable they are using the computer. The learning curve is very short, however, and once new users get it, they like it.”

### Consistency and Communication

Performance factors specific to job functions are built into Performance Pro and have been beneficial by allowing fair, equitable and consistent ratings of employees in each job function. Defined performance factors by job function means all tellers or customer service managers are being evaluated against the same performance requirements with the same rating definitions.

Ms. Linderman recalls, “Working with our Human Resources department, we did change and customize a portion of the position specific performance factors to meet our requirements and this took some time; but having appropriate factor definitions readily available for each position makes setting up and evaluating employees very efficient.”

Zions places a high degree of importance on clear employee to manager communication. To facilitate interaction and feedback, Zions fully utilizes Performance Pro’s self evaluation feature and optional 360 degree type review and multi-appraiser function with downline view<sup>1</sup>.

Providing added relevance to Performance Pro’s evaluation rating

system is its full integration into Zions merit increase program.

Zions Bank is now planning the deployment of Performance Pro in additional groups and departments to better leverage the operational and developmental benefits across the entire organization.

Ms. Linderman concluded, “Since implementing Performance Pro, employee communications have improved considerably through meaningful interactions that are based upon achievement and development. Just as important, Performance Pro has helped Zions become focused on meaningful performance areas across the organization that have resulted in improvements and enhancements to the bottom line.”

### Performance Pro Customer Benefit Summary

Customer requirement	Performance Pro capability	Result	Customer benefit
1. Ease of use – user friendly	<ul style="list-style-type: none"> <li>• Clear, uncluttered interface</li> <li>• Simple, intuitive instructions</li> <li>• Company specific content</li> </ul>	<ul style="list-style-type: none"> <li>• Fast implementation and deployment</li> <li>• Minimal training required</li> <li>• Increased relevance and acceptance</li> </ul>	<ul style="list-style-type: none"> <li>• Improved manager efficiency and employee communication</li> <li>• Increased productivity</li> </ul>
2. Confidential, secure online access	<ul style="list-style-type: none"> <li>• Secure hosted 24/7 HRN server</li> <li>• Daily data backup</li> <li>• Off site remote data co-location</li> <li>• Secure administrator level access</li> </ul>	<ul style="list-style-type: none"> <li>• Anytime, anywhere, secure online access and convenience</li> <li>• Centralized data storage and real-time revision updates</li> </ul>	<ul style="list-style-type: none"> <li>• No customer IT administration or hardware/software overhead</li> <li>• Individual password protection</li> <li>• Increased accessibility</li> </ul>
3. Consistency and fairness of evaluation criteria	<ul style="list-style-type: none"> <li>• Defined performance factors</li> <li>• Company-wide rating system</li> <li>• Current and future goal documentation</li> </ul>	<ul style="list-style-type: none"> <li>• Consistent rating scale across all job functions</li> <li>• Reduced subjectivity</li> </ul>	<ul style="list-style-type: none"> <li>• Increased relevance and legitimacy</li> <li>• Improved communication and focus on achievement</li> </ul>
4. Enhanced review and communication abilities	<ul style="list-style-type: none"> <li>• Self appraisal, 360 degree feedback, multi-appraiser and downline view</li> <li>• Integrated HR forms</li> </ul>	<ul style="list-style-type: none"> <li>• Clear communication of performance expectation</li> <li>• Relevant and useful input and feedback</li> </ul>	<ul style="list-style-type: none"> <li>• Beneficial documentation</li> <li>• Improved manager efficiency and employee communication</li> </ul>
5. Ease of administration	<ul style="list-style-type: none"> <li>• Secure administrator level access</li> <li>• Centralized data storage and access</li> <li>• Usage and rating trends reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Minimal training and user documentation required</li> <li>• Ease of data access and record update</li> <li>• Accurate manager/employee hierarchy</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced administrative cost</li> <li>• Consistency and fairness in performance rating criteria</li> <li>• Usage and rating report data</li> </ul>

<sup>1</sup> Self appraisal feature is standard with Performance Pro. 360/multi-appraiser features are optional.

