



Managing growth with a single, integrated platform

Founded in 1927, Heritage Bank, a leading community bank in the Pacific Northwest, is focused on helping its customers build their dreams in their local communities. Shannon Carson, assistant vice president and human resource information system (HRIS) officer for Heritage Bank, joined the company 12 years ago when the bank had about 150 employees. By 2014, as a result of mergers, acquisitions and organic growth, the employee base grew to about 800. Carson spoke with us about the growing pains that accompanied that rapid growth, particularly around trying to scale employee processes and procedures, and how ADP Workforce Now® helped address those challenges. Here's what she had to say.

The benefits of an integrated system

Often times the payroll side of the system doesn't talk to the time and attendance side or the HR side doesn't talk to the payroll side. With ADP Workforce Now, everything is integrated into one platform. A single platform ensures that not a lot of manual work needs to take place, outside of making sure the employees clock in — and then all of their information feeds right into payroll. We can store all employee information in one place and we're easily able to pull reports.

Accurate data reporting helps drive strategic planning






Reporting is my bread and butter — having the right data that is useful and actionable. That starts with ensuring that the data within our system is valid and accurate, and ADP's analytics module helps me with that. As an HRIS officer, I need to analyze that data to present a cohesive story to our executive team, so when they ask for information about employee turnover or salaries, I'm able to produce that information quickly and in a way that they can understand.

Being able to analyze and identify trends in the data I pull from ADP Workforce Now and predicting what's going to happen in the future has been really useful in terms of our strategic direction as a company.

Shannon Carson
AVP, HRIS Officer



Quick facts

-  **Company:** Heritage Bank
-  **Headquarters:** Olympia, Washington
-  **Industry:** Finance
-  **Employees:** 800
-  **Product:** ADP Workforce Now®

Learn more about Heritage Bank
at heritagebanknw.com



Always Designing
for People™

State-of-the-art recruitment tools to win the war for talent

The job industry has tightened over the last couple of years and it's tough for businesses because we are fighting in the war for talent. We are in a particularly competitive industry in the Pacific Northwest and we're constantly competing for the best of the best.

ADP has been instrumental in helping us to recruit great talent. With tools such as the recruiting platform, we can streamline the recruiting process for candidates. A candidate can go to our website, link directly to our careers center and apply for open positions; it's very streamlined. We also have partnered with ADP's Screening and Selection Services to do our background checks, which we run to make sure that potential hires are eligible under FDIC rules to work in a bank.

As a federal contractor, we're also required to do a lot of compliance reporting. ADP's recruiting system integrates with the HR and payroll systems, which makes our jobs easier — everything is in one place.

Using insights to retain talent

When we do hire great employees, we don't want to lose them. With ADP Workforce Now, we're able to identify patterns as to why people are leaving the company. We can use that information to monitor levels of engagement. We need to understand what people's talents are and what their skill sets are. Our employees can enter that information themselves and we can use this repository of talent information to help with our succession plans. Plus, when we have open positions to fill, we typically fill them internally. That supports our culture of promotion from within, along with employee development and advancement, and finding additional ways to engage our employees.

Compliance made easy

We're a publicly-traded company so, in addition to the banking regulations we have to adhere to, we also have specific regulations to follow. ADP Workforce Now has features that help us do that.

We have our tax and compliance portal with the reporting we need to help us stay compliant, especially with continuous changes to regulations. Recently we were looking into the changes around executive compensation for 2018, as well as changes coming very quickly to the Equal Employment Opportunity (EEO-1) report. I appreciate that ADP has been very proactive about not only providing updates, in terms of what types of changes are coming, but also with updating the system, which may alleviate some of the extra work.

Service that goes the extra mile

I recently contacted ADP with a specific question and, in the course of the conversation, the associate that I was speaking with began to ask me additional questions — really digging to try to uncover my needs. She was actually able to identify a need that I had and she provided a solution.

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It had to do with onboarding new employees and some of the processes they need to complete within their first couple of days. She helped me understand how to automate a process that had previously been manual. That totally exceeded my expectations. She not only helped me to figure out a part of the system that I hadn't previously understood, but she also saved my team a lot of time. The associate's probing made us more efficient and I appreciated her attention to detail and the time she took to uncover a hidden need and provide a solution.

Encouraging feedback for continual improvement

ADP has several avenues for providing feedback. There's a product suggestion area on the platform itself and I'm also part of the Client Advisory Council (CAC), which gives me the opportunity to interact with ADP executives and offer suggestions for improvement. I do feel that ADP has been open to those suggestions and the company has implemented some of them.

At a recent CAC meeting, we listened to a presentation about ADP® DataCloud. I mentioned during that discussion that it was unfortunate our managers didn't have access to critical information, such as turnover and terminations, because it would help make them more accountable for their own team's results. Within the next two weeks, our managers had access to that information through ADP DataCloud. So, there's proof that ADP listens to my feedback and makes improvements based on it.

Employee communication through the ADP portal

ADP plays both a technical role and a "people" role in terms of how we use the platform. It's a technical tool, which obviously we use to pay people. But it's also a tool that helps our employees engage with the company. We use it as our portal. It's our landing page. Our HR team communicates critical information to our employees on the ADP portal homepage. We also use it to link to our performance and talent management system and other systems.

Partnership

I view ADP as a partner. They care about our success. They care about the efficiency of our processes. They care about helping us to strategically partner with our executive team. They want to take the admin work out of HR and put those tools in the hands of the users. ADP has our best interests at heart and wants to arm us with everything we need to do our jobs.

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