


Progress Update Presentation of *January 17th, 2002*
Financial Services Summit Planning Team



Review Purpose of CSSC Initiative

Strengthen the human resource supply chain for Finance,
Insurance Services Cluster & Call Center Industry

Via Customer Service

Supply Chain (CSSC) Pilot



Review Investors - To Date



Finance &
Insurance

Mellon

National City

Highmark BC/BS

**30 Total Make Up
the 4 Teams**

Call Center

Automated
Health
Systems

CSSC

Other

African
American
Chamber of
Commerce
Staff Support

Workforce
Connections

TRWIB Staff
Support &
Training Funds

Planning Teams - Review



Business Planning: Sustain – Integrate



Placement: Place – Retain – Develop



Training: Screen – Test – Train



Recruiting: Profile – Market – Recruit

CSSC Recruitment Planning Team Progress



- ❖ One meeting to date (next week #2)
- ❖ Recruitment and PRISM marketing process and key influences agreed to by team
- ❖ Profiles of successful placements initiated
- ❖ HR data mining for geographic and demographic insights
- ❖ **Data-Driven System Employed**

CSSC Training Planning Team Progress

- ❖ Three meetings to date (Mid Feb. Next)
- ❖ Planning integrated across:
 - ❖ Pre-training program elements (Recruit, Screen, Test)
 - ❖ In-training program elements (Educ. for Retention)
 - ❖ Post-training program elements (SOPs & Advancement)
- ❖ Much up-front career exploration and screening (assessment) planned to ensure FIT with training, career paths, and industry. R&D partnership with Bizet's AVA and CS FIT assessment to screen in right candidates.
- ❖ Contextual & competency based model of training and certification will be used with Career Development programming integrated throughout process

CSSC Training Planning Team.. Continued

- ❖ Inventorying participating firms present practices to create a draft “common best practice” outline/process flow
- ❖ CSSC skill survey completed by over 30 staff, high performers, and managers to date. Others progressing. Agreement on core skill outline!
- ❖ Leverage CDPN and RLN when expanding regionally. Have partners on board already!
- ❖ NEXT - Outlining career paths
- ❖ NEXT - Outlining certification (employability) competencies and national CS certification linkage with National Retail Fed. and NSSB.

CSSC Placement Planning Team Progress

- ❖ Two meetings to date (mid Feb. Next)
- ❖ Reviewed employer involvement during training to meet candidates & ensure equitable and fair system of placement for all employers
- ❖ Candidate responsibility outline initiated to use in recruitment & training screening
- ❖ Job fairs will be held at end of each class
- ❖ During first actual job fair, event to be recorded as a Virtual Job Fair for WWW posting and use by subsequent classes and for recruitment, firm research, and career path planning by recruits and career facilitators. Careerwired.com Lite site possible to “see” what the work is and market careers and employers.....

CSSC Business Planning Team Progress

- ❖ One team meeting to date (next week #2)
- ❖ Initial firms targeted to seek investing and participating, and peer to peer contacts underway by us, HR execs. & corp. foundations
- ❖ Sustainability plan of employer co-pay for graduates at placement adopted
- ❖ Leveraging with other existing retention and advancement program of CDPN/Goodwill being planned and was adopted by Training Team
- ❖ TRWIB and other govt. program potential investment with training, case management, and retention supports

Total Program Support Needed: Planning to Pilot

- ❖ Workforce Connections -- \$20,000
- ❖ Corporate Foundations -- \$40,000
(\$46,000 raised - \$14K needed)
- ❖ Corporate Participants – In-kind
(22 corporate team members participating to date, and expanding daily)

\$150K ESTIMATED FOR INITIAL PILOT & PLACEMENT OF 50 HIGHLY GROWTH ORIENTED FSRs, CSRs, Tellers, etc.

Progress to Fill Funding Gap for Planning & Pilot



- Meeting being set with Citizens Bank
- Contact with Verizon Wireless in Cranberry (outline sent and calls in)
- TRWIB Proposal Drafted
- Rural Consortium Participation/Employer Recruitment (Tri-County with IUP and Indiana County Chamber)

Progress Summary

Process

- FSC Presentation
- Teams engaged/ plans evolving & minutes submitted to WC
- Outreach to new firms initiated

KEY CHALLENGES:

- Coordination issues in loosing employer reps via assignments or job changes
- Proprietary issues
- Emp. Team hand offs and re-engagement time

Linkages

- Job retention and advancement partnership with GWPitt, RTC
- NRF – National Cust. Svc. Certification Pilot
- AVA- FIT Screening
- Rural pilot potential
- TRWIB support with Pgh. residents

KEY CHALLENGE

- Dong it all with \$ in red now but other innovations for success/scale possible¹¹

Next Steps -

Discussion Items



- Additional Charter/Investor Employers to Scale
- Team Meeting Attendance via Tammy Potter at FREEdLANCE (412-429-7650 ext 25) or cssc@freedlance.com
- Data Needs of Demand Driven Project & Learning Provider Preparation/RFP Planning – so pilot funds need secured soon
- CSSC Long-term Role Under Cluster Organizer