



**First Citizens
Bank**

First Citizens Bank Improves Candidate Experience, Candidate Quality and Time-to-Hire Using Assess Systems™

CASE STUDY: FIRST CITIZENS BANK

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Chuck Lotz
Senior Vice President
Manager of Strategic Staffing
First Citizens Bank

First Citizens Bank is a stable, values-driven financial organization with more than a century in business. Integrity, consistency, common sense and quality are evident in the personalized service each customer receives. Headquartered in Raleigh, North Carolina, the bank offers nearly 400 branch locations in eight states and employs 5,000-plus individuals. The organization’s business banking services won 12 Greenwich Excellence Awards in 2010.

As the banking industry continues to change, First Citizens Bank remains focused on its traditional values and high standards. The bank extends this focus to its employees by striving to hire and retain skilled, talented individuals who work with excellence within the company culture and team environment.

Challenge ►

One-Dimensional Manual Assessments, Inconvenient for Candidates

For five years, First Citizens Bank used manual assessments for high-volume positions that included tellers, call-center agents and check processors. In 2008, when its vendor announced a discontinuation of its assessment line of business, decision-makers at the bank began to seek an upgrade. The vendor’s services and support were adequate, but the process was cumbersome and candidate-unfriendly. The assessments themselves measured basic skills and nothing more. An applicant had to drive what was often 30 to 45 minutes or more to a vendor location to take the assessment in a proctored environment.

“We have a mission to ensure that we attract quality candidates that not only fit the job, but also fit our culture,” stated Chuck Lotz, Senior Vice President and Manager of Strategic Staffing at First Citizens Bank. “We needed a solution that would enhance the candidate experience and ensure quality.”

“We had disparate systems,” added Kathy Woodard, Vice President and Recruiting Manager. “There were delays because the process stopped until the vendor completed the assessment with the candidate.”

Solution ►

Vast Improvement: Full-Featured Assessments at Half the Cost

Peoplefluent had been the bank’s applicant tracking system (ATS) vendor since 2001. With the goal of integrating assessments with their ATS, Chuck and Kathy drew from the Peoplefluent



Talent Selection.
People Development.™

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Advantage program partnership list when they searched for a new assessment vendor. They found they could cut their assessment costs approximately in half while receiving automated assessments that were far more comprehensive.

Assess Systems, which had been part of the Peoplefluent Advantage program for four years, was chosen from among three finalists in the selection process. “There was a demonstrated interest—genuine interest—in doing business with us, not necessarily just selling their product,” said Chuck, “and they had expertise in the banking/financial services world.” He was impressed with **Assess Systems’** responsiveness and professionalism from the start. The assessments were to evaluate personality and behavioral attributes in addition to skills, thus providing a rich source of valuable, role-specific information for candidate selection.

“They had stability and a history with their product,” Kathy commented. “A lot of vendors are doing mergers and acquisitions, and it’s a hodgepodge of systems that may or may not talk to each other.” She also noted that **Assess Systems’** values and philosophy were a close match for the bank.

Smooth Implementation and Integration With Peoplefluent

Assess Systems set to work onsite by shadowing employees and conducting an extensive job analysis. Using the **Select™** platform for non-exempt positions, the team refined assessments for tellers, call center agents and check processors, along with a banking-specific 10-key skills assessment for the check processor role. **Assess Systems** leveraged decades of research for all the roles and conducted a validation study for the teller assessments to fine-tune the scoring and ensure they were predictive.

First Citizens Bank, **Assess Systems** and Peoplefluent worked together to integrate the ATS with the assessments. **Assess Systems** provided a test environment for the assessment scenarios, and Peoplefluent’s pre-production test environment helped with the launch on the technology side.

“It was a smooth implementation. We had excellent communication from all parties,” stated Kathy, an experienced recruiting manager. “A difference between **Assess Systems** and other vendors is the **Assess Systems** project managers were also the subject matter experts. I liked that. You don’t have a project manager who knows how to manage but can’t provide thought leadership.”

Result ►

Better Quality Candidates and Shortened Time-to-Hire

Assess Systems’ information-gathering process generated buy-in and eager anticipation from bank associates and executives. Results are evident in terms of quality, speed and retention. “We have comments from supervisors and managers saying the quality of the applicant pools they’re interviewing is higher,” said Kathy. She also mentioned a decrease in involuntary turnover for item processing.

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Chuck Lotz
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Positive reports also came from the teller side. “There was an immediate reduction in terms of the time it took to get to the higher-quality candidates and get them in front of managers,” Chuck indicated. “There’s greater confidence not only that we’ll have a quality hire, but also that the employee will stay with us.”

For First Citizens Bank, a candidate’s cultural fit is critical. Because the assessments measure innate skills and personality, new hires are more likely to be suited for their roles and the bank itself. The bank is pleased with the improved candidate experience, the depth and breadth of information the assessments deliver, and the efficiencies resulting from an automated, integrated, streamlined system.

Plans to Leverage Assessments in Additional Areas

For the future, Chuck and Kathy have identified the potential of using assessment results for performance and development plans. “Our HR generalists see the power in that,” Chuck said. The bank also anticipates exploring the use of assessments for onboarding, sales and leadership development.

Chuck and Kathy look forward to expanding the business relationship. “**Assess Systems** is a great partner,” Kathy said. “We’ve had very positive interactions with everyone we’ve dealt with.”

According to Chuck, “Sometimes vendors ask you questions that you think they should be asking themselves. **Assess Systems**’ people know their areas of expertise, and they’re very professional. Isn’t that the way it’s supposed to be? We hope to continue to do more business with them in the future.”



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