

Peoples Trust improves time off management process efficiency by 90 percent



Customer

Peoples Trust
www.peoplestrust.com

Industry

Financial services, including banking, loans, mortgages and investment services

Headquarters

Vancouver, Canada

Use Case

Time off reporting and tracking

Challenges

- ▶ Obsolete manual process to manage employee time off and vacations
- ▶ Older system hindered ability to group employees in separate calendars
- ▶ Lack of insight into employee availability
- ▶ Administrative burden in managing time off related processes
- ▶ Needed to report time by activity and group
- ▶ Potential time off liabilities complicated compliance

Peoples Trust has been providing boutique financial services to the Canadian marketplace since 1985. The company focuses on exceptional customer service backed by extensive product knowledge and experience.

Rather than being all things to all people like some giant banking organizations, Peoples Trust has amply demonstrated that a smaller company can be very successful if it is well managed and exceeds the expectations of its customers. A 30 year track record of diligent service stands testimony to the company’s customer-centric approach and contributes to its steady growth.

Outlook-based system complicated time off management

Peoples Trust was hard pressed to keep up with various administrative issues that came along with its strong organic growth and the introduction of new financial services and products. There was poor insight into the availability of employees due to the Outlook-based time off reporting system that was being used earlier. Time off and vacation tracking became an administrative challenge, compounded by the fact that their earlier system could not group employees into different calendars to streamline time off reporting.

Further, the lack of a cloud-based system that could be used anywhere to report and approve time off hindered reporting and caused delays and more frustration. Compounding the problem, management had to reach out to the IT team even for small changes to reports, which meant more delays in getting the information back, by which time it was often too late to be actionable.

Replicon meant quick adoption and streamlined time off management

As Director of Human Resources at Peoples Trust, Jo-Anne Morefield oversees talent management, recruitment, learning and development, employee relations, compensation, as well as benefits and payroll. According to Jo-Anne, the company’s top priorities are to “Profitably grow the assets administered by the company, enhance customer loyalty by delivering innovative financial products with exceptional client services, and create a rewarding work environment for employees.”

After researching online and looking at various solutions to help streamline their cumbersome time off management system, Jo-Anne and her team chose Replicon. The primary reasons were Replicon’s ease of use, self-service reporting and tracking capabilities, and overall streamlined process.

Administrative time and effort savings coupled with quick adoption

According to Jo-Anne, “We saw close to 100% adoption of Replicon within the first few weeks by all users of the system. Tracking balances and accruals used to be difficult. Now it’s a breeze. We estimate that the solution cut administrative overheads and reduced the time and effort needed by 75-90%.”

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Jo-Anne Morefield, Director of HR, Peoples Trust

Results

- ▶ Streamlined tracking of balances and accruals
- ▶ Reduced administrative issues
- ▶ Rapid adoption (-100% in a few weeks)
- ▶ 90% improvement in data accuracy
- ▶ 75-90% decrease in time and effort to manage time off
- ▶ Reporting efficiency increased to 80-90%

About Replicon

Replicon is the leading provider of cloud-based time tracking software. Our award-winning solutions are used by more than 1.5 million people in over 7,800 organizations across 70 countries. We help customers to better manage workforce attendance, expenses, projects, professional services teams, and shared services resources.

Our diverse customer base — from start-ups to Fortune 500 companies — trusts Replicon to help reduce compliance risk, keep costs down, and provide greater insight into business performance. Clients include: FedEx, MetLife, New Zealand Transport Agency (NZTA), Novartis, Orbitz, and Xerox. Replicon is a global company with employees in Australia, Canada, India, the United Kingdom, and the United States.

Along with the streamlined procedure for approval workflows, management also appreciated the easy integration with Active Directory to further streamline their workforce management.

Continued Jo-Anne, “Replicon provided excellent support and training, with a great deal of knowledge sharing from their customer success team. This truly enabled us to quickly roll out the system and get everyone to learn to use the system within a matter of days.”

Features and capabilities went far beyond manual tracking

While trying out Replicon, Jo-Anne and her team appreciated the configurability that the system allowed, its powerful reporting abilities, the directness of the reporting workflow, as well as the user-friendly interface that allowed for quick viewing of accruals and balances.

Jo-Anne had much to praise, mentioning that “Creating reports is much simpler now, not just for historical data, but current reporting too. I really like the cloud-based system that’s accessible anywhere. For department and managers, the ability to edit reports, such as being able to change the start dates for a project, are very convenient and simple.”

Not only did adoption of Replicon increase data accuracy to the tune of 90%, the overall improvement in time off management proved to be a boon. Reporting efficiency improved 80-90% with the new system, from days to just hours.

“If Replicon was not there, we needed to find someone else who could do it. We are very happy with the solution and I have already recommended it to others.”