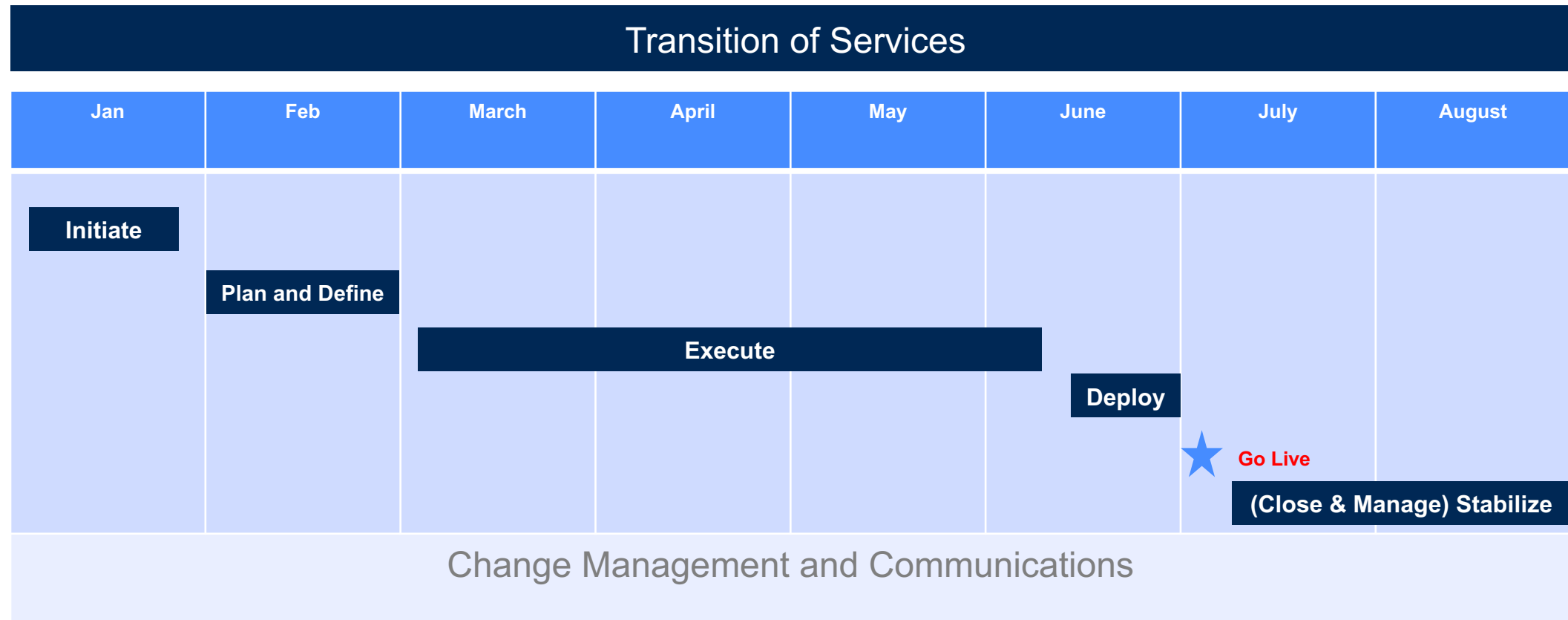


# Wells Fargo Transition to Conduent



# Wells Fargo Transition Timeline

Conduent is experienced with complex implementations and organizations. Our dedicated team of transition experts will manage each step from planning and design through execution and ongoing support.



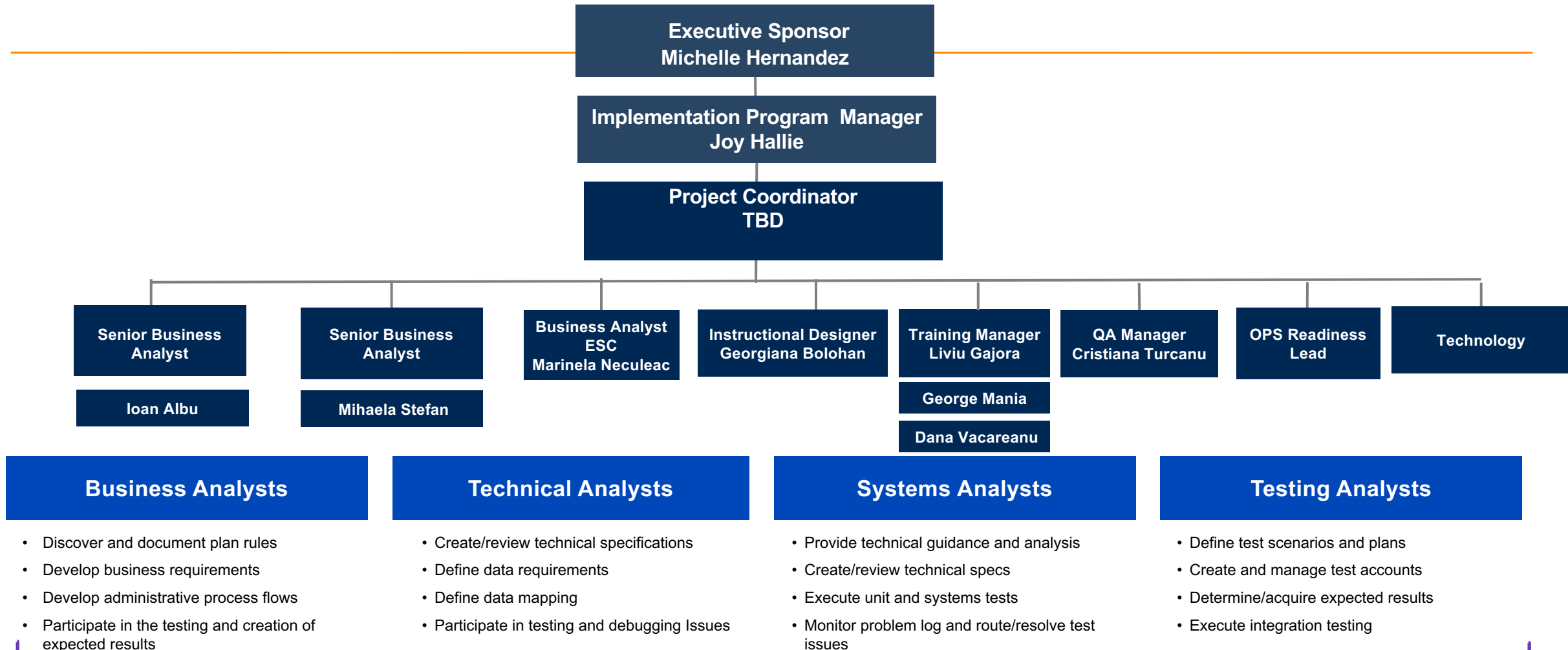
# Project Methodology - People



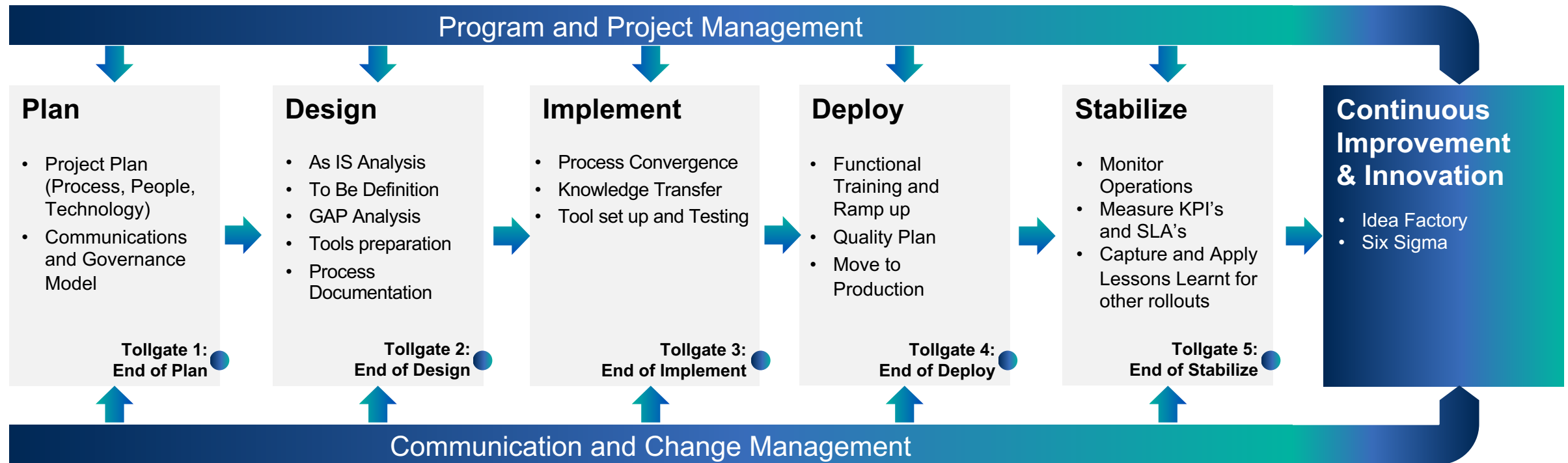
## Deliverables:

- Onboarding
  - Training
- Conduent Operations staff trained on client specifics (training of new hires and training on deviations from standard)
  - Induction Training on HR Services, Customer Service, Master Processes
  - Training on Standard HR Processes and deviations
  - SuccessFactors and other in-scope systems Training
  - Practice on transactions
  - Tools for the Employee Service Center (IVR and ServiceNow)
  - As part of the traditional Execute Phase (Design, Build, Test and Train)  
The outcome / final stage is that all system / people / documentation are ready to enter Operational Readiness Test

# Conduent Implementation Team Structure



# Transition Methodology



- Highly repeatable, standardized, proven and award winning
- Flexible to accommodate business priorities
- Drives transformation and transition, tailored to process level
- Client involved in every step - Partnership that we do with you
- Checkpoints (Tollgates) at the end of each Transition Stage

Integrate Conduent Services with Client processes, organization, and culture, and promotes the collaborative environment needed for Client and Conduent to be successful.

# Key Success Factors

## Leadership & Governance

- Executive Sponsorship
- Strong Project Leadership
- Strong Process Ownership
- Robust Governance Model
- Effective Escalation Path
- Win/Win Partnership

## Communication, Change & Risk Management

- Clear Transition Goals Communicated
- Early and Transparent Communication
- Risk Management Plan
- Manage Stakeholder Expectations
- Strong Project Communication
- Change Management Plan

## Project Resources

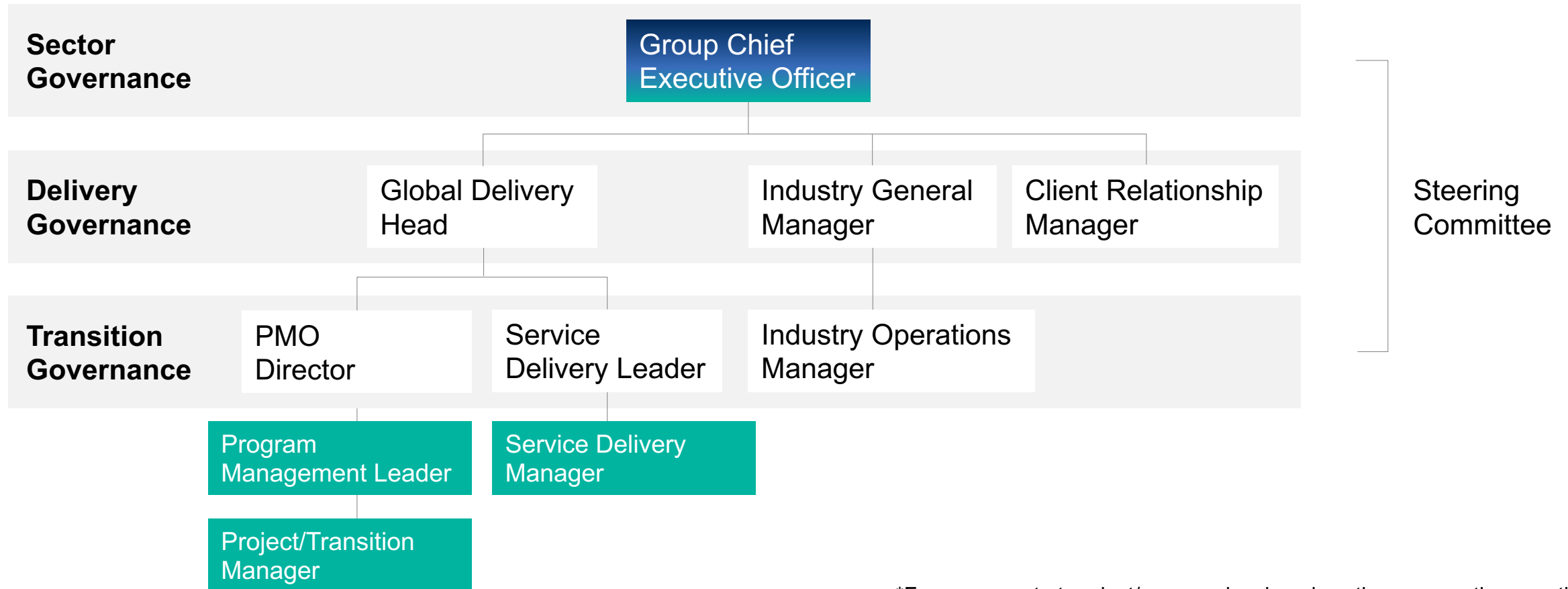
- Transition Team Continuity
- Teamwork with Client Counterparts
- IS/IT Involved from the Start of Project
- Retain Key Subject Matter Experts
- SMEs Availability for Design and Training

## Project Resources

- Project Management Toolkit
- Tollgate Approval for Project Milestones
- Accurate Process Documentation Capture
- Web Recording for Knowledge Transfer
- Process Documentation Repository
- Progressive Ramp Up with Quality Plan
- Leverage Lessons Learned

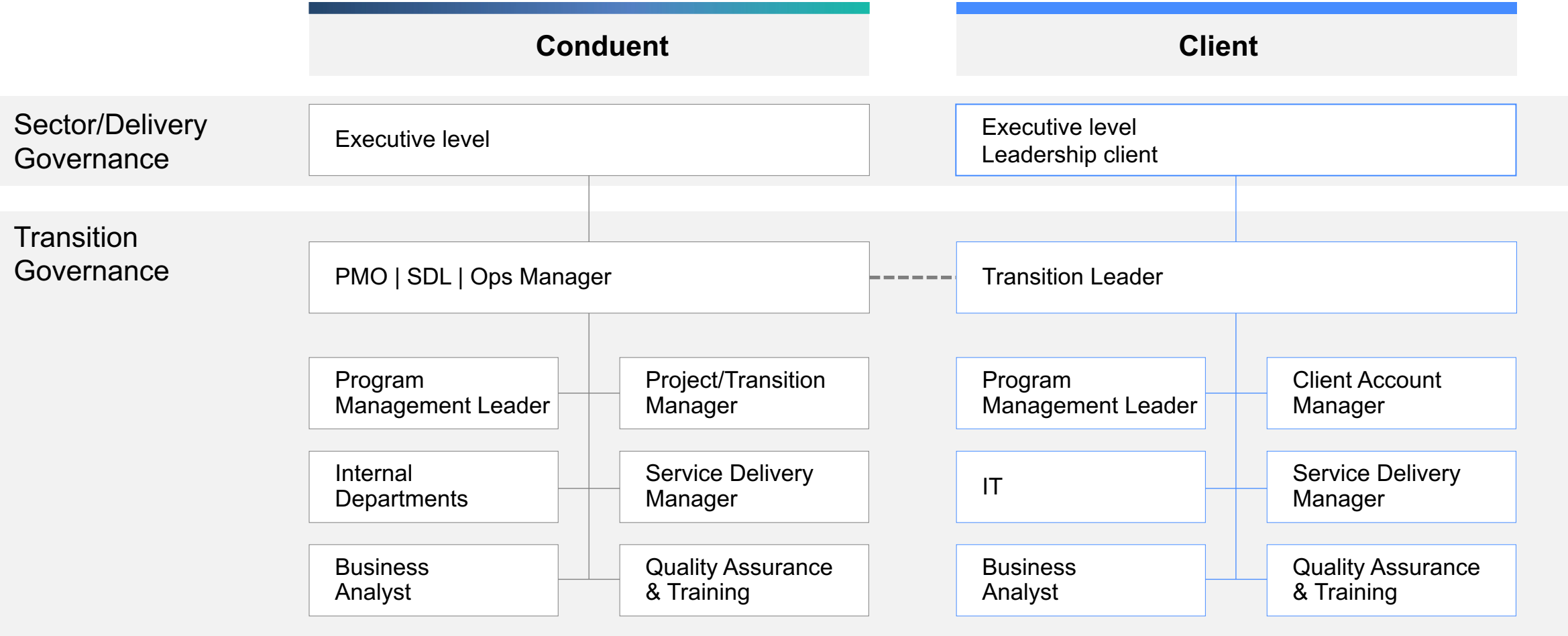
Conduent  
Added Value  
Expertise

# PMO Structure



\*Frequency set at project/program level, no less than every other month.

# PMO Structure



\*The above roles do not translate into full-time employees



# PMO Roles and Responsibilities

PMO Director	Responsible for leading the PMO Office ensuring achievement of projects and programs delivery as well as portfolio management for all industries. Deliver standardized structure and best practices to ensure alignment to Sector Strategic goals, support program conception, frame and modeling.
Program Manager	Strategic role. Responsible for a group of projects and project managers. Manages and monitors portfolio health. First point of escalation, responsible for planning 30-60-90-day pipeline and provide Executive Status for the corresponding Industry being managed.
Project Manager	Responsible for delivering on project objectives. Manages the project deliverables per the project schedule, track and update actions, risks, issues, project status and dashboard, keeps project on track.
Project Coordinator	Supports specific tasks on the project, not accountable for the overall delivery of project objectives. Works in conjunction with business owners and project managers on delivery and tracking of specific items.
Project Analyst	Project resource responsible for producing specific reports, track action items, producing metrics or spreadsheets and documenting specific workflows and processes as part of a project. Works in conjunction with PMs, Business Owners and Coordinators.

# Communications Matrix

Communication Type	Purpose	Duration	Frequency	Method	Responsible Party	Audience / Required Participation
<b>Meetings</b>						
<b>Project Status Meeting</b>	Milestone Status , Review Issues and Risks	60 min	Weekly	Conference Call	Project Manager	Core Team, workstream leaders, Client Project Manager
<b>Executive Status Meeting</b>	Review of Project Scorecard <ul style="list-style-type: none"> <li>Overall Project Status</li> <li>Key Issues</li> <li>Key Risks</li> <li>Project Spend vs. Budget</li> </ul>	30 min	Bi-Weekly	Conference Call	Project Manager	Delivery and Transition Governance, all project stakeholders per RACI
<b>Project Workstream Meetings</b>	Working Sessions	60 min	Weekly. More frequently as needed	Conference Call	Project Manager	Workstream Subject Matter Experts
<b>Risk Management Meeting</b>	Review and Disposition Risks	30 min	Weekly	Conference Call	Project Manager	Transition Governance, Client Program/Project Manager
<b>Program Status Meeting</b>	Inform Program Manager of Project Status	30 min	Weekly	Conference Call	Program Manager	Conduent, Project Managers, PMO Director
<b>Change Control Board</b>	Review and Disposition Proposed Project Changes	30 min	Bi-weekly or more frequently as needed	Conference Call	Program Manager	Conduent Program Manager, Delivery Governance, Client Program/Project Manager
<b>Written Communication</b>						
<b>Project WBS</b>	Project Tasks & Schedule		Weekly	Project Web	Project Manager	Project Stakeholders per RACI
<b>Project Scorecard</b>	Project Health, Milestone Status, Key Issues & Risks		Weekly	Document	Project Manager	Transition and Delivery Governance
<b>Project Escalations</b>	Create awareness and secure executive support to resolve key risks and issues		Per Occurrence	Email / Phone	Project Manager	Responsible and Accountable owners, Level resource as needed.
<b>Project Documents</b>	Project team repository for all project documents except those stored on TFS SharePoint		Ongoing	Maintain on Project server	Project Manager	

# Key Client Roles

A successful implementation will require the commitment of our Partner's resources as well. They will typically be needed for planning and coordination, procedure documentation reviews and validations, training and assessments, as well as Go Live readiness.

## Project Manager (Throughout the entire project)

- Project Governance
- Schedule and Roll Out Strategy
- Project Budget
- Issue/Risk Management
- Communication and Change Management
- Tollgate reviews

## Process Champion (Throughout the entire project)

- Resource Assignments
- Advocate Target Operating Model
- Implementing convergence plans
- Ramp Up planning monitoring
- Issue/Risk Management
- Retained organization
- Tollgate reviews

## Subject Matter Experts (On specific project phases)

- Current State documentation
- Desktop Procedure reviews
- Training support and assessments
- Ramp up planning & monitoring
- System roles and access requirements
- Quality monitoring
- Go Live readiness

## Network/System PM (As early as possible)

- Connectivity design and testing
- Data Security
- Application access

# Governance

## Key Stakeholders

## Communication Frequency

**Client and Conduent**  
Senior Executives

Strategic  
Direction

**Strategy:**  
Annual Executive Meetings

**Client and Conduent**  
Relationship Executives

Business Goals,  
Contract Management,  
Issue Resolution

**Governance:**  
Quarterly Business Reviews

**Client and Conduent**  
Global Operations Leadership

\*SLA Results, Performance, Management,  
Operational Excellence, Change Management,  
Operational Goals & Objectives, Issue Resolution

**Operations:**  
Monthly Business Reviews

**Client and Conduent**  
Functional Management

SLA Adherence, Performance Management,  
Issue Identification, Tactical Planning and  
Execution, Issue Escalation

**Execution:**  
Weekly Operations Review

**Client and Conduent**  
Function-Specific  
Participants

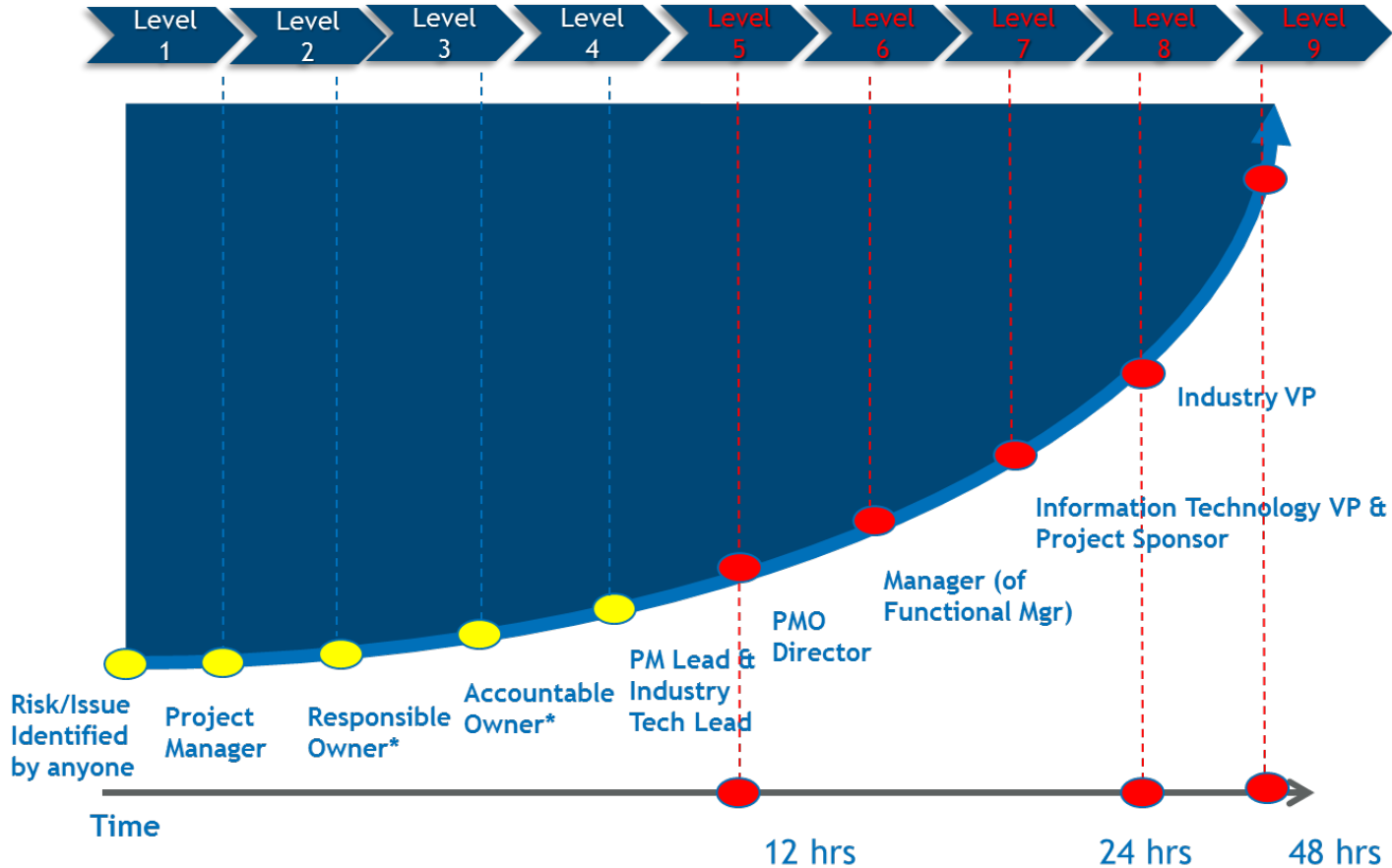
Manage process & procedures: Procedural Knowledge and  
Work Control, Issue Identification, Corrective Action Execution

**Delivery:**  
Daily Operational Contact

**Effective and proven governance structure promotes collaboration  
regular & effective process control, escalation, and issue resolution**

\*SLA = Service Level Agreement

# Escalation Process



Level 2	Level 4	Level 5	Level 6	Level 7	Level 8	Level 9
Project Manager	Program Management Lead	PMO Director	Service Delivery Director	Service Delivery Leader & Industry Ops Manager	Global Delivery Head & Client Relationship Manager	Industry General Manager

# Dashboards & Reporting

## Highlights & Accomplishments

**Overall Project** G

**Project Status Legend**

- R Project in trouble, need management help
- Y Project concerns, learn in control
- G Project will meet requirements
- B Project complete

**Staffing Concerns**

- Staff has transitioned over to Conduent as of 1/1/18 smoothly.

**SLA Status**

- All SLA's met

**Capacity Ramp Up**

- Additional Print and Insertion Equipment installs on target to be completed 1/26.
- PDP #10 and 6x9 volume transitioned to Erlanger. January run is 48% printed and 37% mailed as of 1/17. On track to be completed by 1/29
- COMEOB jobs on schedule to be transitioned to Erlanger on 1/20
- MEDEOB jobs on schedule to be transitioned to Erlanger on 1/27

**Job Transition**

- PTS team has started delivery of sample files to Conduent (83 delivered by 1/18)
- Conduent has started sample analysis and will begin job onboarding on 1/24
- Humana and Conduent implementation teams continue working tors compressing the project timeline

## Transition Status

**Project Status** G

**Project Status Legend**

- R Project in trouble, need management help
- Y Project concerns, learn in control
- G Project will meet requirements
- B Project complete

Month	Planned % of Jobs Migrated to Date	Actual % of Jobs Migrated to Date	Planned Total Print Volume Migrated to Erlanger	Actual Total Print Volume Migrated to Erlanger	Volume Remaining on Almond Avenue
1/9	0.27%	0.27%	42.52%	42.52%	57.48%
1/20	0.53%	0.53%	43.14%	43.14%	56.86%
1/27	0.80%	0.80%	56.39%	56.39%	43.61%
2/17	5.60%		59.31%		40.69%
2/24	8.40%		63.90%		36.70%
3/3	11.07%		64.07%		35.93%
3/10	13.73%		64.07%		35.93%
3/17	16.40%		64.07%		35.93%
3/24	19.07%		64.07%		35.93%
3/31	23.73%		68.54%		31.46%
4/7	28.40%		92.98%		7.02%
4/14	33.07%		96.55%		3.45%
4/21	38.40%		96.65%		3.35%
4/28	43.73%		96.78%		3.22%
5/5	49.07%		97.22%		2.78%
5/12	54.40%		98.14%		1.86%
5/19	59.73%		99.94%		0.06%
5/26	65.07%		99.94%		0.06%
6/2	70.40%		99.94%		0.06%
6/9	75.73%		99.95%		0.05%
6/16	81.07%		99.95%		0.05%
6/23	86.40%		99.95%		0.05%
6/30	92.67%		99.99%		0.01%
7/7	100.00%		100.00%		0.00%

## Project Timeline

# Project Management Toolkit

## 1. Plan

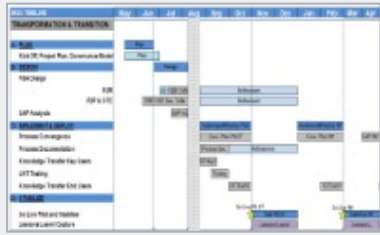
## 2. Design

## 3. Implement

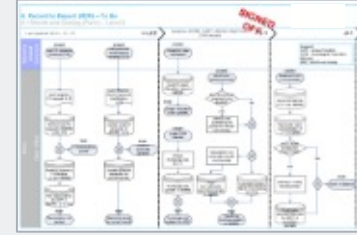
## 4. Deploy

## 5. Stabilize

### Project Timeline



### To Be Process Maps



### Convergence Plan

Item	Sub-Item/Description	Team	Start/End/Status	Dependencies	Notes
1	...	...	...	...	...

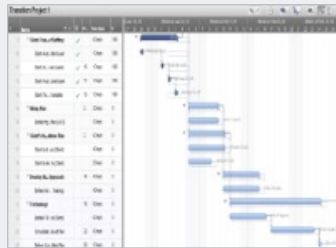
### Ramp Up Analysis



### SLAs Reporting

Item	Process Name	Target	Actual	Delta	Status
1	...	...	...	...	...

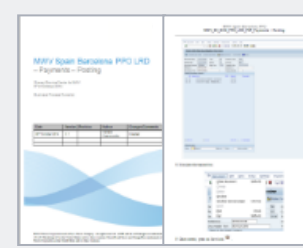
### Project Plan



### Gap Analysis

Area	Current State	Target State	Gap	Priority
1	...	...	...	...

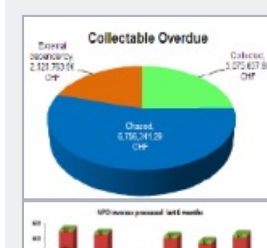
### Training Manuals



### Quality Analysis

Item	Category	Value	Status
1	...	...	...

### KPIs Reporting



### Governance Model

Meeting	Participants	Chairman	Frequency	Objectives
1	...	...	...	...

### Process Assessment Matrix

Item	Process	Assessment	Score
1	...	...	...

### Trainings Assessments

Item	Assessment	Score
1	...	...

### Hand off Tollgate

Item	Criteria	Status
1	...	...



# Change Management

Conduent transformation team will play an integral role in the Change Management process

