



THE NEW MODEL OF RECRUITMENT & RETENTION

IT'S ALL ABOUT EMPLOYEE ENGAGEMENT

Lisa Fabiaschi

VP, Business Development

AGENDA

- 01 Brief Background of COCC and Myself
- 02 Attracting, Developing and Retaining Top Talent
- 03 Employee Engagement and Inclusion
- 04 Diversity, Equity, Inclusion and Belonging
- 05 2024 and Beyond



LISA FABIASCHI

VP, Business Development

About Me

Lisa Fabiaschi, Vice President of Business Development at COCC, is a seasoned professional with a strong background in recruiting and business development. With over 25 years of experience in the Financial Services sector, Lisa has a proven track record of success in attracting top talent and securing new core clients for the company. Having started her career in an Executive Search firm, Lisa has honed her skills in identifying and bringing on board the best candidates to meet the needs of COCC. Her deep understanding of the industry, has positioned her as a valuable asset to the organization.

Since transitioning to Business Development, Lisa has played a key role in driving COCC's growth and success in a competitive market. Her strategic vision and customer-centric approach have been instrumental in helping clients find the right solutions for their business needs. As a dedicated professional, Lisa continues to be a driving force behind COCC's continued success and expansion.

COCC FAST FACTS

\$206M

IN REVENUE 2023

\$8.2M

NET INCOME IN 2023

\$222M

REVENUE IN 2024

\$130B+

CLIENT ASSETS MANAGED

\$40M

2023 CORE SALES

200

CLIENTS



GREAT PLACE TO
WORK-CERTIFIED™
FIVE CONSECUTIVE YEARS

COCC'S SVP & CPO TOP PRODUCT
LEADERS IN FINTECH INDUSTRY
THE FINANCIAL TECHNOLOGY REPORT

7M

ACCOUNTS



25%

CLIENTS
OVER \$1B

11

11

CORPORATE
GOALS MET

#1

TOP LEADER IN CT
RICH LEONE, CEO
2019 & 2015

210K

ACCOUNTS OPENED
ELECTRONICALLY

4.5

5

REPORT CARD
GRADE AVERAGE

6th

LARGEST CORE SERVICES
PROVIDER IN U.S.

#1

TOP WORKPLACE IN CT
2023 (LARGE EMPLOYER)

36

STRAIGHT YEARS OF
PROFITABILITY

13

CONSECUTIVE YEARS AS
A TOP WORKPLACE IN CT

2M+

MOBILE & INTERNET
BANKING ACCOUNTS

EMPLOYEE INFORMATION

730 EMPLOYEES **112** NEW HIRES **35** INTERNS **19%** OF STAFF HAS HAD CAREER MOBILITY IN PAST 12 MONTHS **11%** TURNOVER

91% WOULD HIGHLY RECOMMEND WORKING AT COCC TO OTHERS

85% COCC MOTIVATES ME TO GIVE MY VERY BEST AT WORK

80% EMPLOYEE PARTICIPATION IN TOP WORKPLACES

8.5 AVERAGE YEARS OF SERVICE

6,631 EMPLOYEE TRAINING HOURS

233 TOTAL TRAINING SESSIONS ATTENDED

TOP-RATED SESSIONS
A DAY IN THE LIFE/
LEARNABOUT

4.7 AVERAGE SURVEY SCORE
SCALE OF 1-5

9% GEN Z

49% MILLENNIALS

30% GEN X

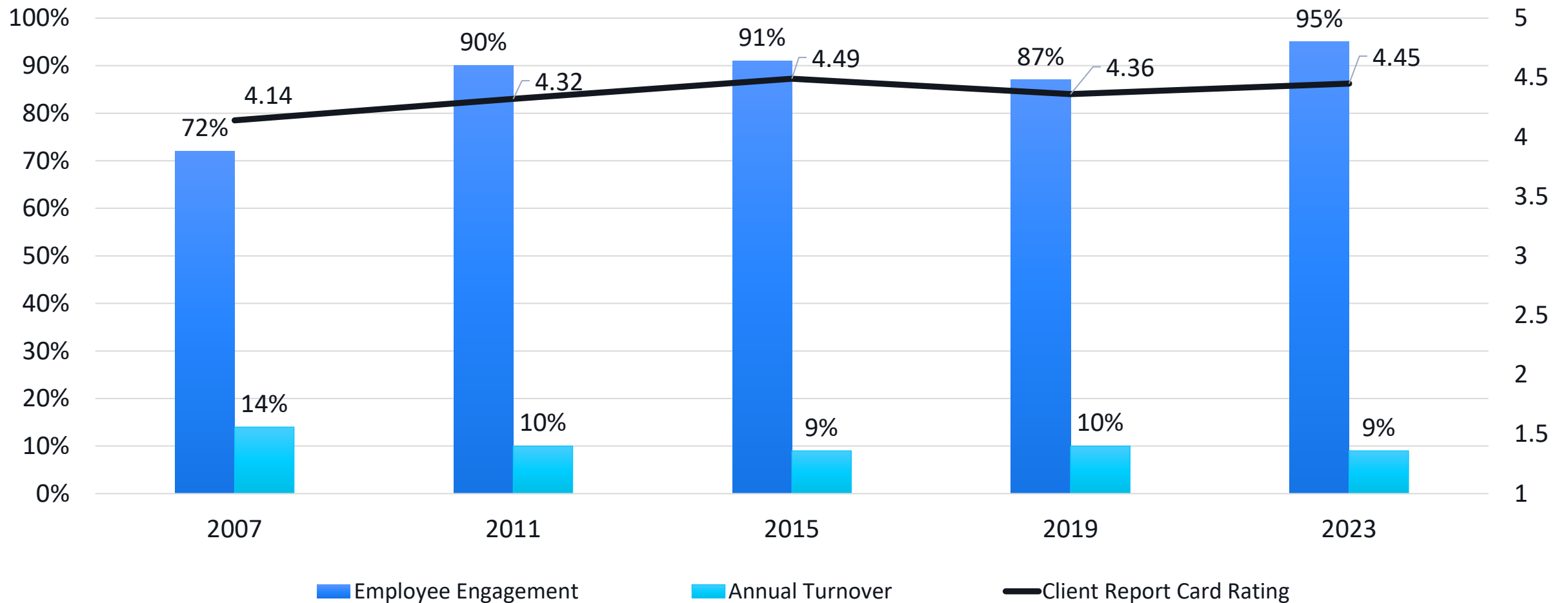
12% BABY BOOMERS

COCC'S TALENT STRATEGY

- Providing a winning customer experience is our highest priority
- Investing in our culture has paid dividends with our employee engagement, ability to implement new products, and overall service to our diverse client base
- Our continued focus is all about inclusion and employee connectedness back to our core values



EMPLOYEE ENGAGEMENT AT COCC: THE STATS

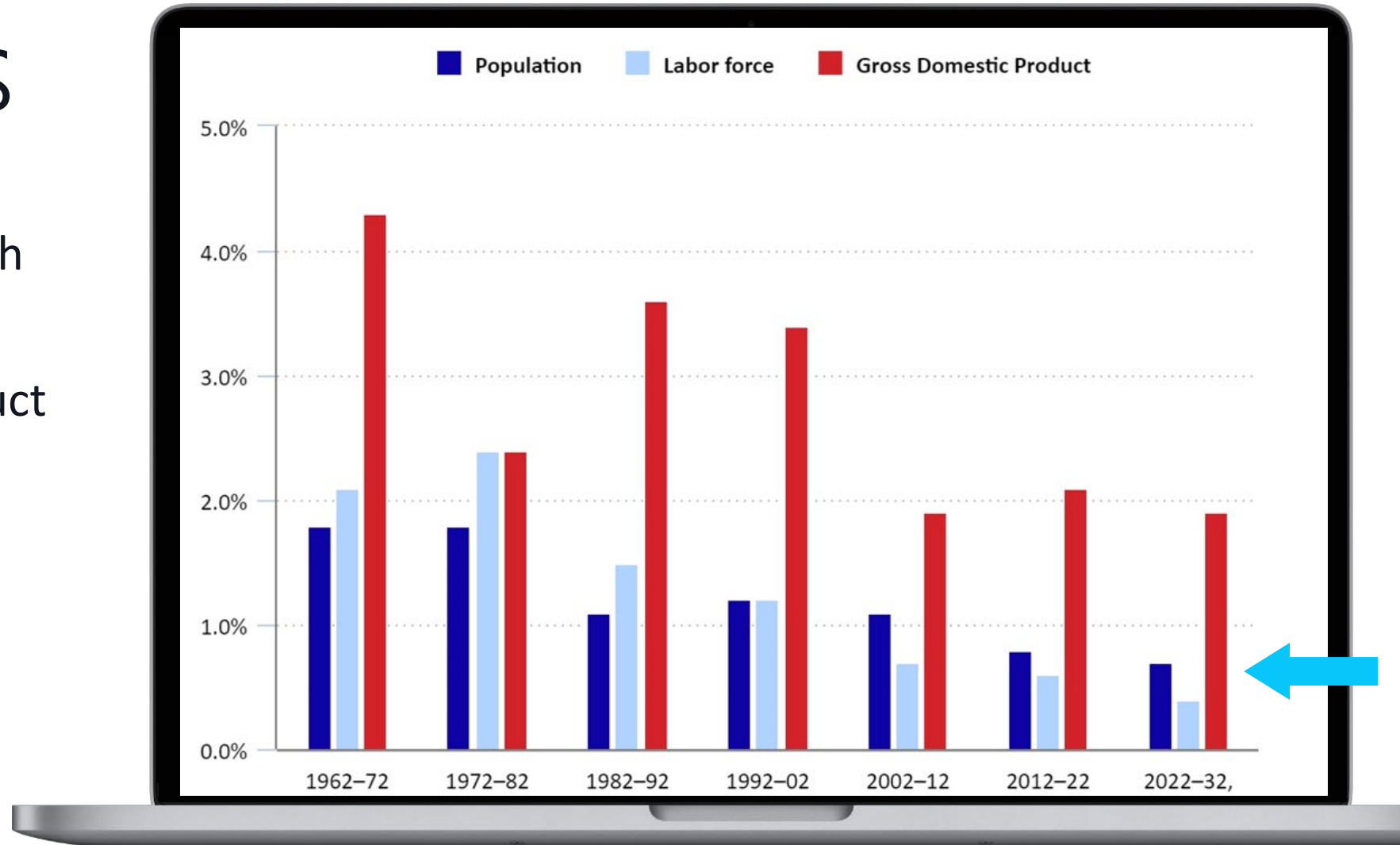


**ATTRACTING,
DEVELOPING
& RETAINING
TOP TALENT**



GROWTH PROJECTIONS

Annual percentage growth in population, labor force and gross domestic product (1962-2022 and projected 2022-2032)



NEW HIRE ORIENTATION



- Launched in August 2022
- Extended orientation from 2 to 5 days
- Onboarding twice a month

The Business Need

- Need for shorter ramp-up time
- Emphasis on service
- More product knowledge

COCC's BEGIN Orientation Program

- Belonging
- Exploration
- Growth
- Inspiration
- Networking

HR TECHNOLOGY

AND THE LIST GOES ON



ClearCompany

CERIDIAN Dayforce



LearnUpon



15five

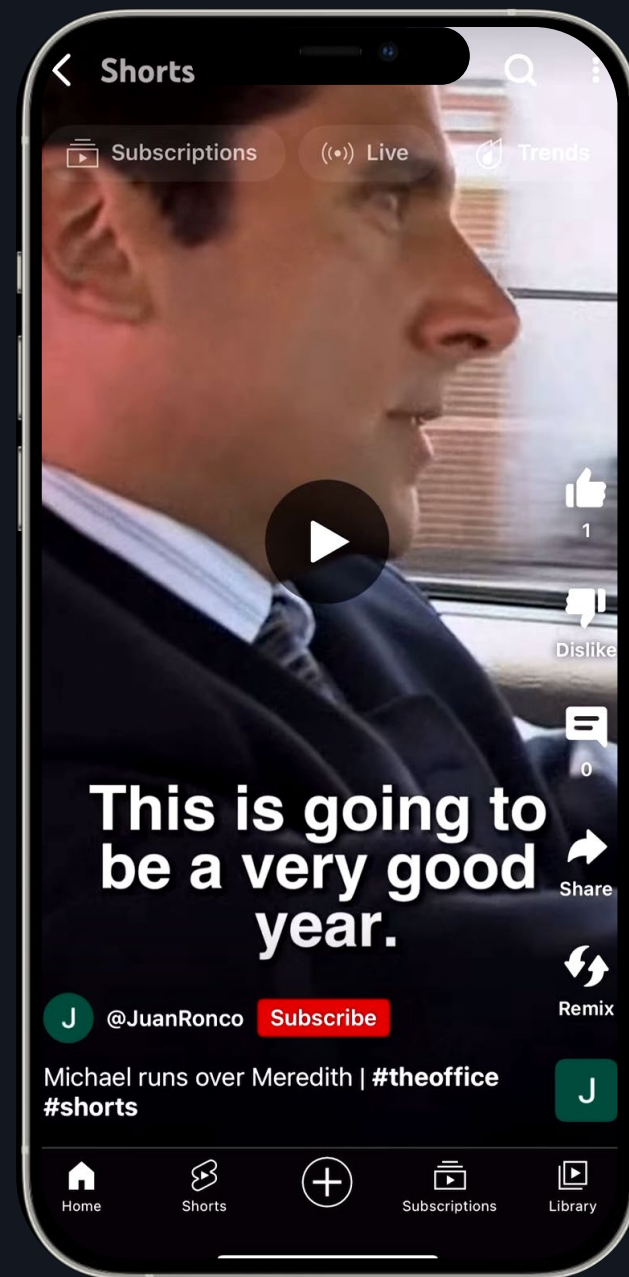


SharePoint



slack

Tell me about the
BEST BOSS
you have ever had...



**EMPLOYEE
ENGAGEMENT
& INCLUSION**

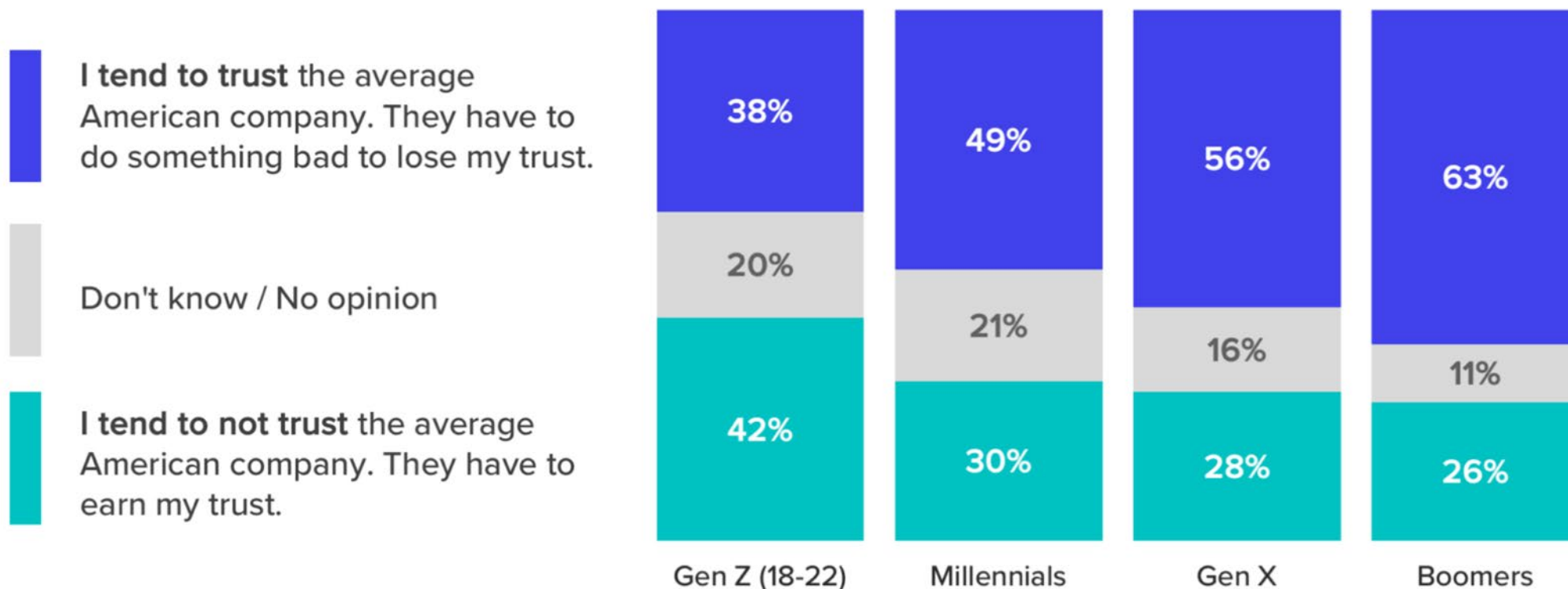






Younger generations are less likely to say their default position is to trust the average American company

Which of the following do you agree with more?

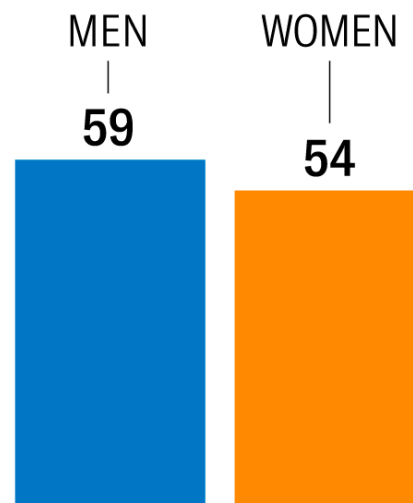


HOW FLEXIBILITY IMPACTS EMPLOYEE TRUST

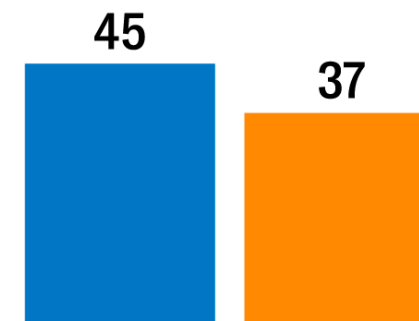
Companies that offer flexible working hours saw higher levels of trust from both their male and female employees, as compared to companies without flexible hours. But there's still a five-point trust gap between men and women at the more flexible companies, largely because women are more likely to be penalized when they use the flexibility benefit.

Trust score by company flex-time policy

Flexible working hours



Nonflexible working hours

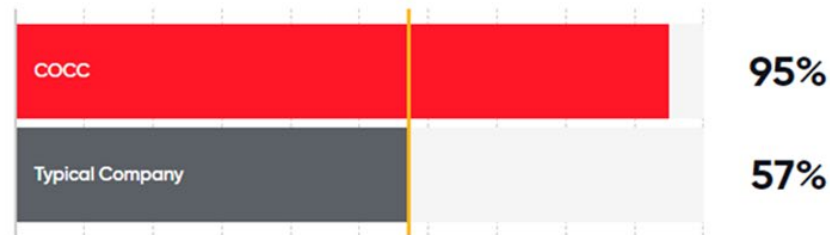


GREAT PLACE TO WORK RESULTS



Employees say
this is a great
place to work

95% of employees at COCC
say it is a great place to work
compared to 57% of
employees at a typical U.S.-
based company.



Source: Great Place To Work® 2021 Global Employee Engagement Study.

97%

When you join the
company, you are
made to feel
welcome.

95%

Management is
competent at
running the
business.

95%

I'm proud to tell
others I work here.

94%

I believe
management
would lay people
off only as a last
resort.

94%

Management is
honest and ethical
in its business
practices.



94%

of employees have
activated their
Forma account

490

average transactions
per month

77%

of employees
have spent money

98%

of reimbursement claims
have been approved

LIFESTYLE SPENDING ACCOUNTS

- COCC partnered with Forma in 2023 to provide employees with lifestyle spending accounts
- Lifestyle Spending Accounts, or LSAs, are a financial “allowance” provided by employers to employees to use funds, within certain constraints, to meet their individual needs
- Two custom wallets:
 - **Be Well** – Gym memberships, nutritional programs, athletic clothing or accessories, smart watches, exercise equipment, supplements, and massage therapy
 - **Be You** – Student loans, childcare expenses, meal kits, household services, streaming services, pet supplies, etc. Whatever makes you, YOU!
- Funds can be spent three ways:
 - Forma card
 - Forma store
 - Reimbursement

PERFORMANCE ENABLEMENT WITH 15FIVE

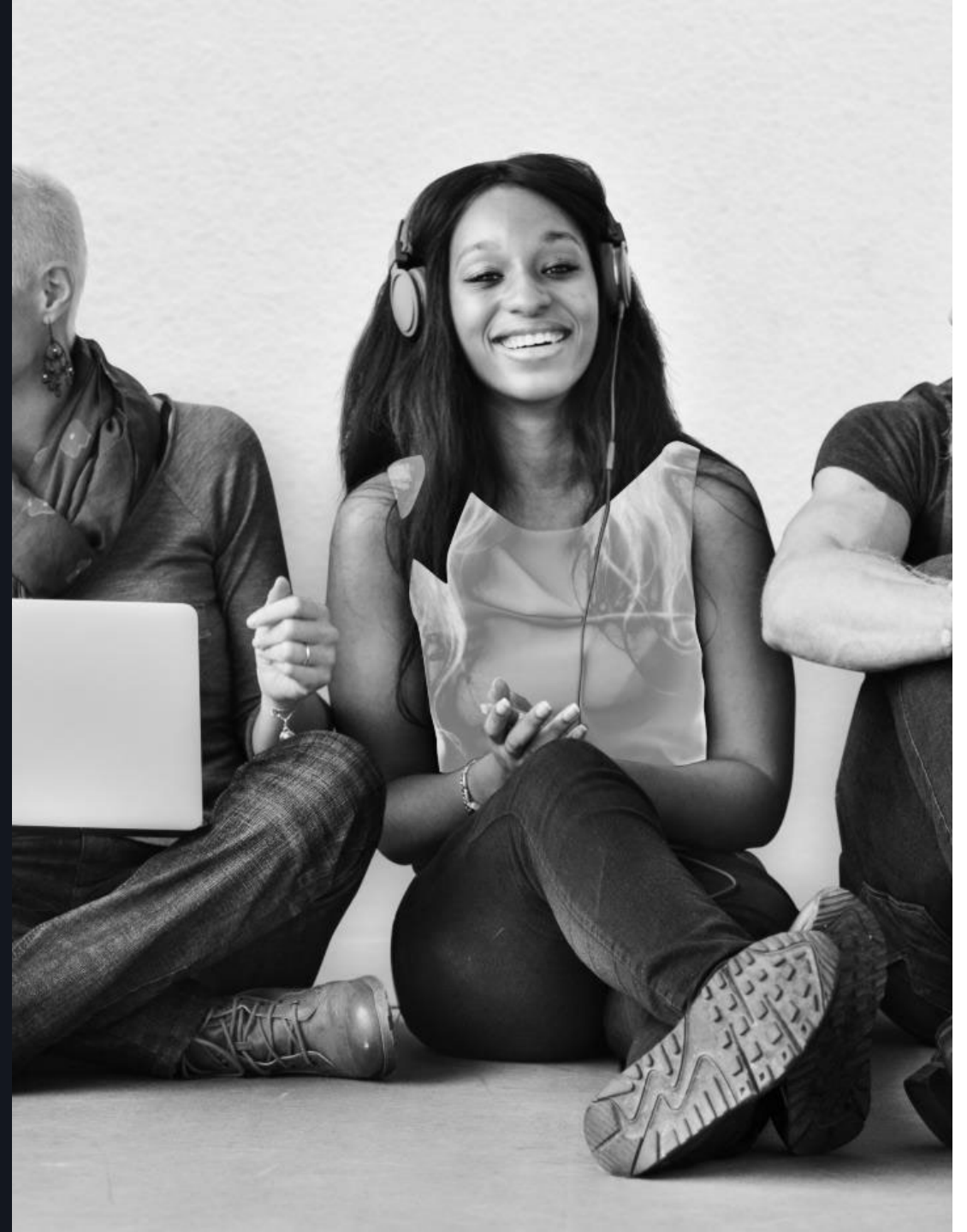


- 15Five is a continuous performance management software that hosts features for feedback, recognition, reviews, career growth, and more
- Biggest question – How did you feel at work since your last check-in? 1-5 scale
- What started in 2020 to help maintain manager-employee connection during the pandemic has now transformed into a platform that we leverage to support the professional development of our employees
- Current features:
 - Check-Ins: done weekly to drive employee development and enhance connection
 - 1-on-1s: provides structure for manager and employee meetings
 - High Fives: peer recognition for coworkers that have gone above and beyond
 - Objectives: map goals and measure progress over time
 - Career Hub: virtual career coach

MENTAL HEALTH

COCC's Investments in Our Employees

- Wellness Days – Employees receive one paid wellness day per quarter to use as a day to relax, recharge, and engage in activities that benefit their mental health and wellbeing
- LifeGuides – COCC is partnering with LifeGuides to provide employees with one-to-one, personalized human support for “everyday life”
- Training classes – DEIB and mental health focused training classed offered through our Talent Development department
- Therapy dog visits and chair massages onsite
- Wellness Committee
- Mental health resource guide
- Employee Resource Groups (ERGs)
- Community service & charitable giving programs



**DIVERSITY,
EQUITY,
INCLUSION &
BELONGING**





THE BUSINESS BEHIND DIVERSITY, EQUITY, INCLUSION & BELONGING

- Higher revenue growth
- Greater readiness to innovate
- Increased ability to recruit a diverse talent pool
- 5.4 times higher employee retention
- When employees don't feel that their ideas, presence, or contributions are truly valued or taken seriously by their organization, they will eventually leave

BELONGING AT COCC

- Offer flexibility in our holiday schedule
- Aligned our charitable contributions to match our DEIB monthly awareness
- Launched Employee Resource Groups (ERGs)
- Ensure all programs and incentives have equity



EMPLOYEE RESOURCE GROUPS



Pride+



Leadership,
Education,
Advocacy, &
Development
for Women
(LEAD for
Women)



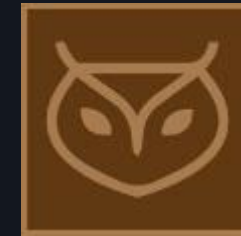
Black,
Indigenous,
& People of
Color (BIPOC)



Veterans &
Active
Military



Accessibility
Community
at COCC
(ACC)



New!
Fifty+



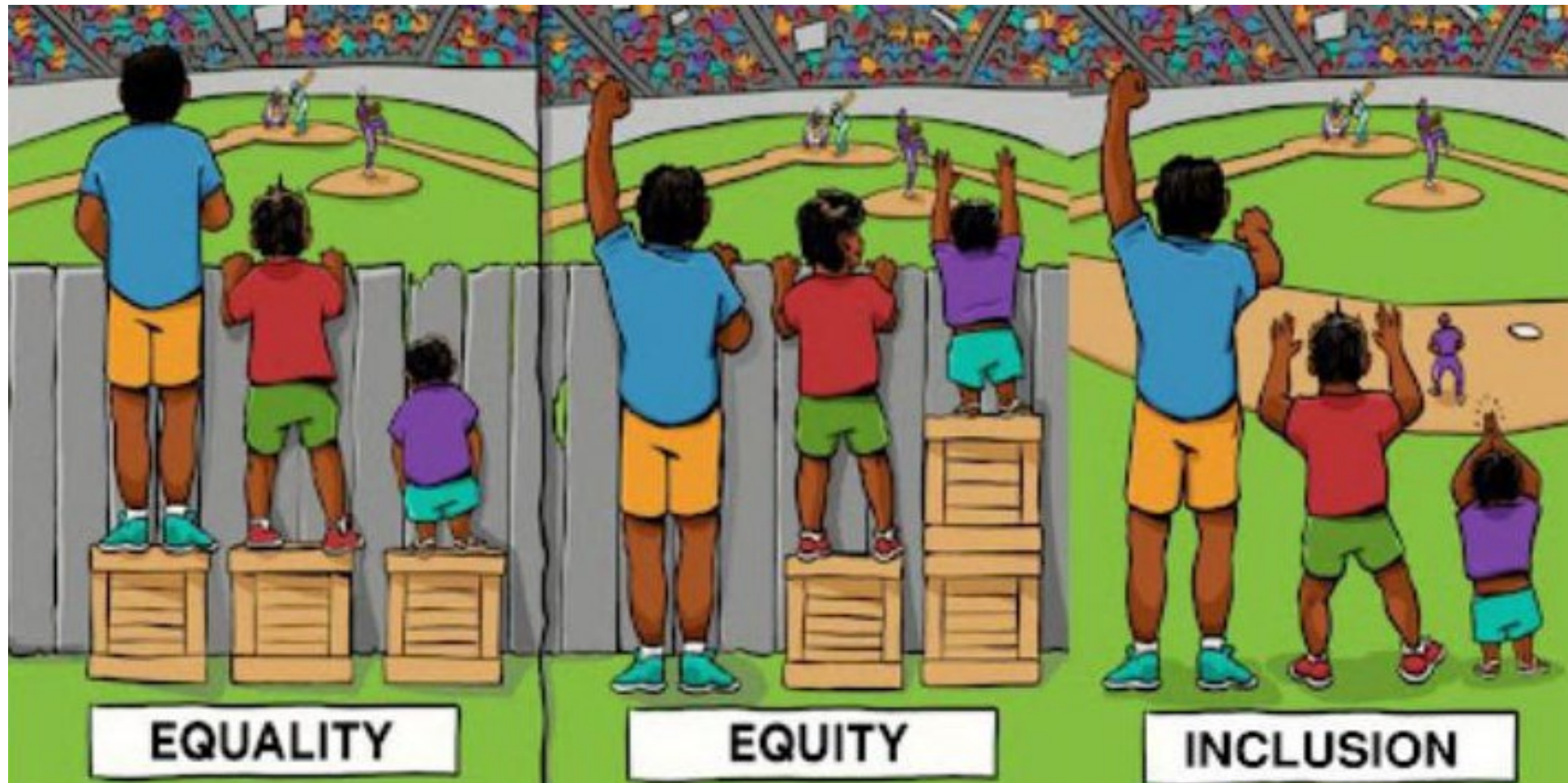
New!
Parents &
Caregivers
Community
(PACC)



ALLYSHIP

Allyship refers to the actions, behaviors, and practices that leaders take to support, amplify, and advocate with others, especially with individuals who don't belong to the same social identity groups as themselves.

THIS IS IMPORTANT...



TOP THREE KEY FOCUS AREAS FOR CEO'S



Growth



Technology



Talent



| **THANK YOU**



Lisa Fabiaschi
VP, Business Development