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SWPP Announces Finalists for 2005 Workforce Management Professional of the Year Award

NASHVILLE, TENNESSEE – March 8, 2005 – The Society of Workforce Planning Professionals (SWPP) today announced the five finalists for the 2005 Workforce Management Professional of the Year Award, which recognizes a workforce management professional who has shown outstanding leadership in the industry. The finalists are Thomas Cunningham of NOVA Information Systems, Chantal Gagné of Bell Canada, Teresa Haze of American Express, Nelson Hermenegildo of EquiServe, and Sandra McFatridge of Hilton Reservations Worldwide.

“These five workforce management professionals are truly representative of the “best of the best” in our industry,” said Vicki Herrell, SWPP Executive Director. “They have all demonstrated great leadership and ability in the field, as well as shown measurable results for their companies. We are pleased to present them as finalists for this distinguished award.”

Thomas Cunningham serves as Workforce Manager for NOVA Information Systems, a credit card processing company. He established and developed the workforce management department at NOVA, using innovative techniques to help the department operate efficiently. Within two months, he had improved NOVA’s service metrics by 45%, and by the end of last year, service level was at an all-time high for the company. In addition, calls per FTE increased by approximately 10% over the prior year, which contributed to a significant reduction in the abandon rate to an all-time low. Thomas accomplished this through a variety of techniques, including rerouting or merging queues and cross-training agents with similar skill sets. These actions, combined with implementing flex scheduling, maximizing the company’s workforce management software, changing overflow practices, and creating efficiency in staff scheduling and hiring, resulted in the reduction of operating expenses for telephone-based FTEs by 11% over the prior year. Another critical component of NOVA’s

workforce management success was Thomas' introduction of a professional appointment policy. Representatives are able to ask for time off for a professional (doctor, dentist, etc...) appointment up to two weeks in advance, and then are allowed to "bank" up to four hours a week that they can make up in the same week. "Thomas has been a critical component in this company reaching its goals" according to Rick White, Senior Director of Customer Service for NOVA. "Tom has been able to make many changes that have been productive and cost-efficient as well as company-friendly and employee-friendly. And as with any time when changes are made on a dramatic scale, there is some resistance by some that are unsure if outcomes will be successful. Tom has been able to cast those doubts aside and back up his ideas with results."

Chantal Gagné is General Manager for the Bell Canada Shared Services Consumer Workforce Management team. She was among the pioneers in the implementation two years ago of a Shared Services concept for all Bell Canada Consumer Workforce Management teams. Bell Canada is segmented into four main lines of business, each with its own contact centers: Wireline Services, Sympatico (ISP), Mobility, and Expressvu (satellite TV). Before the Shared Services implementation at the end of 2003, each line of business had its own workforce management service with its own practices. The challenge for Chantal was considerable: centralize, unify, and mobilize a group of over 200 workforce management employees from different lines of business with different processes and practices. In addition to this, she also had to deal with the contact center General Managers to build the group's credibility. Leading this large group, Chantal has worked extensively on standardization of process between organizational functions and departments. Within one year, she has achieved many improvements, including: restructuring the workforce management teams, introducing service agreements with its stakeholders, implementing operations review meetings with partners to review results, piloting schedule changes in two business units, and implementing a contingency plan for each business unit at a real-time. She implemented standardized metrics through all the centers, and her outstanding management skills enabled her to rally her team to work towards a common goal. "Chantal's knowledge, drive, and passion for workforce management and her team were key to the success of the workforce management centralization at Bell Canada," said Pierre-Olivier Samson of Bell Canada.

“There are few people more dedicated and passionate about workforce management, and the centralization of such a big workforce group is a great success story for the whole industry. Chantal constantly challenges the status quo in order to move the group and the field further.”

Teresa Haze, Senior Manager of Forecasting at American Express, recently completed a three-year project to deploy Aspect eWorkforce Management software across eight American Express sites located around the world. Throughout this massive implementation project, Teresa managed to stay on task, keep her team focused, and work through enormous hurdles to reach the customer’s goal for success. She oversaw every aspect of the project in its entirety, which involved moving the entire American Express operation from call volume allocation to staff allocation. All sites had to be upgraded to a newer software version, a major undertaking under normal circumstances. However, this project ran into major project obstacles, such as system failures, occasional low team morale, and the need halfway through the project for additional funding. Teresa consistently built a business case around the process and was able to repair the technical failures, improve and maintain team morale, and through a lengthy process, obtain the additional funding needed to complete the task. The project greatly improved how overall efficiencies were managed and has helped the American Express Credit Group manage staff in a more streamlined and efficient way. Overall, the workforce runs more smoothly, individual staff are more effective during every task, and processes are completed more rapidly. “We were amazed at the talent, skill, and depth of knowledge in not only technical but business areas that Teresa brought to the table to ensure completion of this vast project,” said Brenda McCann of American Express. “She could have stopped the project several times due to unexpected and significant problems, but instead she forged ahead, finding solutions, maintaining leadership, and keeping her eye on the ball. She never let her team – or us – down.”

As Manager for EquiServe, Nelson Hermenegildo heads a team of professionals responsible for five contact centers around the country. Nelson’s group is charged with building a workforce plan in August for the following year, and then fine-tuning it weekly with an expectation of consistently being within 5% of actual staffing needs. Nelson has been able to

surpass this goal and come within 1% of forecast nearly every month. He is also charged with managing the “Bridge” function, with full traffic control to all five centers. At any given time, he is rerouting traffic to offset surges as they occur, and he augments this traffic control with extensive productivity management tools such as his creation of a daily report to unit managers on the performance of staff in the unit, or in tracking and shepherding cross-training efforts to increase the pool of “skilled” associates available in a unit. His focus on productivity, without sacrificing quality, allowed EquiServe to achieve a 12% increase in productivity in 2004. Nelson has inserted his team into the production control process to both assure timely delivery of fulfillment materials, as well as providing instruction as to appropriate mail drop times and amounts, leading to more efficient control of contacts responding to mailings. Beyond this, he was also integrally involved in workforce management improvements through the creation of an Assist Center for associates and Management Escalation queues to provide immediate access to a supervisor for callers. According to Michael Lapolla, Senior Managing Director for EquiServe, “Nelson’s workforce management skills admirably combine the science of call switch management and precise call forecasting, the recognition and integration of outside influences for contact, and the art of recognizing minute by minute adjustments, allowing EquiServe to achieve superior customer service acclaim while being extremely efficient in terms of our company bottom line.”

Sandra McFatrige is Manager, Forecasting and Planning for Hilton Reservations Worldwide (HRW). When Sandra was brought on board in 2002, a number of significant challenges were laid before her: improve forecasting accuracy, reduce overstaffing, and match the best agent to each and every caller in a highly complex, multi-site, multi-skill contact center environment. And do it all while maintaining the excellent level of customer service for which Hilton is known. The improvement initiative started with four components, including upgrading Hilton’s existing workforce management system to meet the multi-skill demands of the company. Sandra took the reins of this project and sold the benefits to management, then laid out a systematic approach to bringing all five sites on board. Within only a few short months of the completion of the upgrade, the company started to see results, and soon was posting the best operations results ever. In 2003, HRW exceeded all key staffing and

financial goals, and did it with a 10% reduction in staff. According to Carl Pollack, Hilton's Director of Operations, Sandra has been able to deliver on this challenge because of her ability to manage change across five regional contact center sites handling 25 million calls a year, the technical know-how to oversee a multi-site workforce management software upgrade, and the poise to communicate effectively at all levels of the organization. "Sandra's a leader who has guided our operation through a significant evolution of both technology and processes, an analytical thinker who's been able to address problems from the 30,000 foot level down to the most minute detail, and a relationship-builder who has fostered cooperation and support at every step of the way. In fact, her efforts have been so successful that HRW has been able to save an estimated one million dollars annually in workforce staffing costs."

The SWPP Board of Advisors selected the five finalists from nominations submitted on the SWPP website. The Workforce Management Professional of the Year award will be chosen from the five finalists by the Board of Advisors and announced at the 2005 SWPP Annual Conference, which will be held March 13-15, 2005 at the Opryland Hotel in Nashville, TN.

About SWPP

The Society of Workforce Planning Professionals (SWPP) is an organization devoted to facilitating education and networking opportunities among workforce planners across all industries. Membership in SWPP is available to all workforce planning professionals and other interested parties from consulting and vendor organizations. Both individual memberships and corporate membership options are available, with full benefits and costs outlined on the organization's website at www.swpp.org.

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