

FOR IMMEDIATE RELEASE

CONTACT: Vicki Herrell  
SWPP Executive Director  
877-289-0004

## **SWPP Announces Finalists for 2006 Workforce Management Professional of the Year Award**

NASHVILLE, TENNESSEE – March 9, 2006 – The Society of Workforce Planning Professionals (SWPP) today announced the five finalists for the 2006 Workforce Management Professional of the Year Award, which recognizes a workforce management professional who has shown outstanding leadership in the industry. The finalists are Phoebe Araujo of Expedia, Inc., Jennifer Behrens of Thrivent Financial for Lutherans, Aaron Jacobs of VW Credit, Kristel Lord of Accenture Business Services for Utilities, and Christopher Matt of Penske Truck Leasing.

“I am very proud to present these five workforce management professionals as finalists for this distinguished award,” said Vicki Herrell, SWPP Executive Director. “Each year, there are so many outstanding nominations that it continues to be a difficult task for the SWPP Board of Advisors to select the top five. Each one of these individuals has demonstrated great skills, leadership, and ability in our industry, as well as shown measurable results for their companies.”

In her role as Manager of Workforce Planning at Expedia, Inc. Phoebe Araujo has found herself at the center of a huge integration initiative — streamlining contact center operations across a vast network comprised of a "who's who" of the world's leading travel companies. With more than 1,000 in-house agents spread across six contact centers throughout the U.S., Expedia wanted to maximize efficiencies to keep administrative headcount down, as well as free up supervisors to remain focused on their most important task - training staff to deliver excellent service. Doing this required a single, consistent process driving workforce management, which presented a challenge in a contact center environment that was disjointed. Many of Expedia's business units became part of the company as the result of acquisitions, bringing with them different processes and technologies. Araujo's task is to

establish a foundation for workforce management across these many lines of business, incorporating shared principals, processes, and technology. Executing this plan has required that Araujo become a master at change management — reaching out to managers, supervisors, agents, and executives to find out what their needs and challenges are, and empowering them to take advantage of the tools she is putting at their disposal. Equally valuable is Araujo's technical expertise. She was brought on board in 2002 precisely because of her familiarity with Aspect Software's eWorkforce Management (eWFM) solution, which has enabled the standardization and automation of all aspects of scheduling — from planning shifts to vacation and meeting requests. "Phoebe understands that when you are dealing with a large-scale technology implementation, you can't just flip the switch and hope for the best," says Craig Friedl, Sr. Director of Workforce and Technology Optimization of Expedia, Inc. "Her ability to make everyone comfortable and a part of the process has been critical to making this initiative work. Because Phoebe took the time to bring everyone to the table before rolling out the technology, we've had virtually zero push back on the changes that have been implemented in the workforce management process. As a result, we've really been able to focus our efforts on realizing the efficiency gains that have been made possible through our newly integrated operation."

Jennifer Behrens has spent 12 years in the call center industry, with eight years in workforce management roles. She is an Advanced Business Process Analyst and senior member of the Workforce Management team at Thrivent Financial for Lutherans, a not-for-profit Fortune 500 financial services organization, located in Appleton, Wisconsin. Jennifer's work supports about 250 Customer Service Professionals in multiple centers. She specializes in overseeing communications regarding self-service channels, leading change management efforts and introducing new call center technology, along with traditional workforce management efforts related to forecasting and scheduling. Jennifer has been a pro-active advocate of best practices in workforce management at Thrivent Financial and the customer service industry. She shares her knowledge with other workforce management professionals in the industry by networking, sharing ideas for publication, and presenting at national conferences. Jennifer has worked with upper management in her organization to change workforce management practices in the customer service areas to improve organizational

behaviors and outcomes. Some significant accomplishments Jennifer has made to workforce management include: a corporate retention study of Customer Service Center employees; partnership with other areas of the organization to promote best practices, resulting in improved communication for workforce planning; as well as setting up shrinkage models and improved service level metrics used to track daily, monthly and annual goals. Jennifer prepared and offered national seminars on shrinkage; submitted several tips and articles for SWPP publication; researched workforce management systems to accommodate the changing needs of her organization's call centers and skillset complexities; and is involved with a corporate Portal project which will achieve efficiencies, moving from multiple applications after a corporate merger to a single desk top application in our Customer Service Centers. "One of Jennifer's strengths is her passion for improvement in workforce management practices that promote improved processes in our Customer Service Center," said Cheryl Paholke, WFM Business Process Analyst at Thrivent. "She does the preparation to take ideas to upper management and receive their buy-in, then proceeds to work on project goals as they are implemented. Jennifer's strong leadership and knowledge of workforce management industry practices and best practices enable her to build trust and confidence for our organization to change and improve workforce management practices. She continues to network and look for opportunities to share that knowledge and expertise with others outside of our organization."

"Just-in-Time people" is the way Aaron Jacobs likes to describe the art of workforce management — it's all about placing people with the right skills, at the right place at the right time to ensure reliable and consistent customer service. It sounds simple, but achieving this objective requires a leader who can effectively integrate process, technology and, most important, people to strike the right balance. VW Credit's growth during the last several years has increased demands placed on its four call centers and more than 350 agents. To continue to provide quality service in an efficient and cost effective manner, VW Credit decided to implement a solution for workforce optimization, and brought Jacobs on board to put a standard, automated process in place to "get everyone on the same sheet of music," according to William Fields, Director of VW Credit's Automotive Service Centers. "We saw the competitive advantage of better managing our people resources, and using their time

more efficiently," he continued. "We needed an exceptional person to manage this new process, and Aaron has consistently met or exceeded our expectations." VW Credit found a terrific man for the job. Not only had Jacobs been through a "soup-to-nuts" workforce management implementation at his previous job with Provident Financial, he'd also seen or held just about every other position the contact center has to offer in his more than 15 years in the industry. Jacobs selected Aspect Software's eWorkforce Management (eWFM) for VW Credit, embarking on Phase I of the deployment in 2003. Since then, he has managed upgrading the software as needed and expanding use of the solution as the company's workforce management process has become more sophisticated. The amount of administrative time that managers spend on scheduling has been reduced by a whopping 80%. Service levels have been increased by 23%. Delay was decreased by 138 seconds and abandonment has gone down by 8%. In addition, VW has been able to almost entirely cut overtime out of their scheduling process — an achievement that's a direct result of Jacob's embrace of variable scheduling. Under his leadership, VW has reduced hold times for customers, improved agent performance (leading to faster, higher quality customer service), enabled more time spent on service rather than administration, and more accurate and effective planning.

Kristel Lord started as a Customer Service Representative with Accenture Business Services for Utilities in August 2000 when a new call center opened in Fredericton, New Brunswick. After her first year, she took a temporary development role within the Workforce Planning Department as a scheduler. It was immediately obvious that Kristel was a star performer in this role, with her ability to recognize patterns, use excellent judgment, and solve problems assisted with process improvement, along with the fact that she was a natural leader. In September of 2002, Kristel was promoted into the position of Workforce Coordinator and took on accountability for Service Level delivery on an important contract. In her two years tenure as Coordinator for this client, service level was missed only once for one of the four queues. In January of 2005, Kristel took on a project to reconfigure Aspect eWFM and implement eSchedulePlanner to automate many of our Workforce Planning processes. Over the course of six months, the entire system was rebuilt: new forecast and staff groups were set up, improved more efficient routing sets were configured, more accurate shrinkage sets

were built, and a disciplined approach to skill combinations was set up. This project resulted in a reduction of nine employees in the Workforce area. It also drove occupancy to improve from 70-80 percent to 80-90% in all queues. Kristel's results exceeded the cost benefit projections for the project by three FTEs and the overall efficiency of the operation has increased as a result of her efforts. All affected employees were reassigned to higher value work or left through natural attrition — no lay offs were required as a result of this initiative. In December of 2005, she was promoted to Workforce Manager. Susan Long, Manager of Operations Support, said she is “looking forward to watching Kristel shape and teach her group over the coming years. Kristel's natural leadership ability, along with deep understanding of Workforce Planning and the call centre business made her a natural choice for her new role. She is constantly looking for ways to improve the team's performance and is well respected by her team and her peers. Workforce Manager is a difficult job and Kristel has proven that she is up for the challenge.”

Christopher Matt joined Penske Truck Leasing as a Workforce Analyst in 2005, and was the first associate hired by Central Reservations that was dedicated to workforce management. Chris came into the job with lots of optimism and enthusiasm, but maybe not realizing all of the challenges he would face. Fortunately he had worked in another call center as a Representative so he understood the business. By his second day, he realized that Penske had a powerful software tool that they knew nothing about and were barely utilizing, and what they were using was not set up properly. His supervisors were very impressed with his abilities as he began to teach himself the software. Within the first two weeks, he had already made small changes that would have a positive impact on the Call Center. As Chris says, once he has everything in place, he wants it will be “like a spicy meatball — very good.” Some of his accomplishments this past year include: corrected Symposium to Aspect Call Volume totals feed; corrected Intra-Day Call Volume percentages; corrected Day-of-Week and Month-of-Year factors to more accurately show current business trends; implemented staff shift to more optimized schedules; lowered forecasted call volume error % from 12-18% to 5-7%; currently implementing accurate Day-of-Week non-availability factors into staffing needs algorithm; implemented Aspect-to-Etime (Payroll system) daily feed; and implemented the new eSchedule Planner system. Chris also established regular

communications to Call Center Associates informing them of call volume projections and success of team handling calls. “We are thrilled that Chris is a part of our team and he has made a tremendous impact in a short period of time, according to Rosanne Stoffers, Assistant Manager of Central Reservations for Penske,. “He is even known for a unique vocabulary that we are beginning to wonder if it is shared with all workforce management professionals. The latest word he used was ‘adderooned’ – definition: acknowledgement that an exception has been received and entered into our eWFM software system.”

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 2006 SWPP Annual Conference, which will be held March 15-17, 2006 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](http://www.swpp.org).

##