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## **SWPP Announces Finalists for 2008 Workforce Management Professional of the Year Award**

NASHVILLE, TENNESSEE – March 20, 2008 – The Society of Workforce Planning Professionals (SWPP) today announced the five finalists for the 2008 Workforce Management Professional of the Year Award, which recognizes a workforce management professional who has shown outstanding leadership in the industry. The finalists are Liz Beardsley of Delta Air Lines, Tony Capuro of Prime Therapeutics, Taras Chmil of Siemens, Tony Graczyk of Principal Financial Group, and Adelina Petrov of International Cruise & Excursions.

“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.”

Liz Beardsley has been a leader in the Workforce Management area at Delta Air Lines since the 1990s. Working with a team of researchers and developers from Delta Technologies, she originally participated in the development of Delta’s internal agent scheduling technologies in 1996 and 1997. The process designed at that time has been consistently found to be more effective in meeting service level goals and lowering excess agent hours than all of the other solutions that have been tested. Always in search of more effective technologies to serve Delta’s customers better, Liz and her team have been following the technological breakthroughs for agent scheduling over the years.

Consistent with their desire to excel in customer service, in the spring of 2004, Liz developed

a plan to evaluate Delta's agent scheduling capabilities against the capabilities offered by various workforce management solutions using a data-driven evaluation initiative. Liz developed and led the plans in selecting two areas involving: four different business units; four different skills; 11 call centers; and 3,202 agents. Remarkably, the results showed that Delta's internal scheduling process was providing better schedule efficiency than all but one of the agent scheduling solutions tested. The benchmarking results also identified a remarkable improvement opportunity using this particular agent scheduling solution in all metrics over Delta's internal scheduling process.

With a solid business case, Liz convinced the senior executive team to invest in the workforce management re-engineering and advanced scheduling technologies. Despite the severe financial constraints, the strength of the business case and benchmarking work Liz led convinced Delta's executive team to go forward with the initiative in 2005 at a time when the company needed savings and efficiency improvements the most, and has resulted in savings of \$3,300,000 per year savings since that year.

Liz's accomplishments and vision are not only a source of pride for her company and group but for all workforce planning professionals. She has more than 10 years in workforce management with deep understanding of forecasting, scheduling, capacity planning, and performance optimization. Her group supports more than 6,000+ Delta and vendors' agents worldwide by developing forecasts and agent schedules. She is an active participant in SWPP programs and various industry panels.

"Liz works endless hours and has the incredible ability to multi-task like few I have ever seen," says Robin Stone, General Manager, Resource Planning & Analysis at Delta. "She owns implementation of the Workforce Management project yet also has over-sight of forecasting and schedule development for over 6000 representatives. Liz consistently delivers results that are on-track and on-time - I am very proud of her work and her contributions to Delta over the years."

Tony Capuro currently serves as Director Resource Planning for Prime Therapeutics LLC, a

pharmacy benefit management company, which has multiple clients with many lines of business supporting customers, pharmacies, and physicians. Tony has 20 years of experience in workforce management and effectively manages a 24x7 workforce at multiple call centers including two internal centers and three outsourced centers with only three support employees.

During Tony's 2 ½ year tenure, Prime has consistently met service levels on our lines of business. In 2007, his hard work and strong analytical skills resulted in Prime meeting all 96 monthly performance objectives with the exception of two objectives in two months for a total success rate well over 99%. He also develops and maintains highly accurate weekly capacity plans for 18 rolling months for 29 lines of business. In 2007, his forecast was within 1% higher of the actual call volume. His group has a goal of publishing the weekly schedules on Thursday morning 90% of the weeks. Last year the group exceeded their goal by successfully publishing schedules on time 98% of the time.

To manage Prime's seasonal call volume fluctuations, Tony has developed special programs to manage through low volume summers and high volume peak periods during the winter months. Tony instituted a voluntary time off program that is very well received by the agents and helps Prime effectively manage its human capital and costs. Prime saved over \$300,000 last year using these voluntary time off programs.

While most centers have seasonal fluctuations in volume, the pharmacy benefit management industries' fluctuations are quite severe. Typically, January call volume is 50% higher than mid-summer volume. This past year, Tony had an even bigger challenge since the company added a new client, but he was able to devise a plan to accommodate a 75% increase in call volume in January 2008 compared to December 2007. He did this by using innovative call routing, skill groups and staffing solutions resulting in service level goals being met consistently throughout January peak season.

Tony's expertise and the programs he has developed have significantly contributed to a reduction in cost per call (35% over two years) and an increase in employee and customer

satisfaction with our services. According to David Johnson, Tony's colleague who nominated him, "Tony is highly regarded by his colleagues. We appreciate his dedication, workforce expertise, analytical skills and his sense of humor. He is truly an outstanding workforce professional."

Taras Chmil has been a workforce management Analyst at Siemens since 2005. Over the past year, Taras has been a true leader in helping to implement best practice within the industry at Siemens. He has been a part of the team that has implemented new long-term forecasting, schedule optimization, schedule processes, training, as well as workforce management presentations and workshops.

Taras has been responsible for implementing many cost savings and efficiency models with the current contact center. He has led a project over the past year that has seen a complete redesign of the queue architecture that has involved leveraging current accounts among skill sets, rather than unique accounts. As a result, he has created models at Siemens that has saved considerable FTE savings within the first year. In addition, this model has also helped the Marketing and Sales teams, as the workforce management group has been able to create defined skilled teams that can now be proactively positioned with new customers. Therefore, when meeting with new clients, they can now allocate that new business efficiently within a leveraged model, which allows them to be even more favorable in our pricing.

Siemens is also ISO 9000 certified, and Taras has been a strong supporter of this program within workforce management. He has worked hard to ensure that all the new processes are documented and have defined KPI's that can be measured every month. Part of the success of this program has allowed him to share these processes with other Siemens centers around the world. He realizes that the key to global success is that all centers share the same processes and has worked hard to begin that alignment.

And of course, one of the key factors for success with any workforce management team is the ability to interact with the front-line teams including Managers, Supervisors and agents. He takes great responsibility in realizing that he represents the balance between the agent's

needs and the customer's needs. He works hard to find a fair balance in managing that relationship.

According to David Goodwin of Siemens, "I think Taras has had great success in this relationship because he is passionate about his work, and doesn't just try to provide an answer, but believes the key to success is education and explaining the rationale behind any solution. As a result, over the past year, he has been able to make a difference to how our agents and management team approach scheduling and schedule management. They now proactively seek out his guidance on issues and as a result, they now have full confidence in the workforce management team's ability to manage their agents schedule efficiently."

Tony Graczyk, Senior Contact Center Workforce Analyst for the Principal Financial Group, joined the workforce management team at the time of the company's initial implementation of a new workforce management system. After the implementation of the Aspect eWorkforce Management product, the organization needed to extend the deployment to support a newly formed call center of over 150 agents. Tony's careful analysis of the contact patterns, enthusiasm to learn the business processes for the center, and understanding of the workforce management system helped to make the new center a huge success. Since the deployment of workforce management software in the new center, the average speed of answer during the busiest part of the year was reduced from 107 seconds to 49 seconds and the abandon rate was reduced from 15 percent to less than 5 percent. Moreover, the number of agents was reduced by 19 full-time equivalents.

Tony also developed a tool that allows schedule information from Aspect eWorkforce Management to be quickly copied into Outlook calendars. Transferring this schedule information allows the agents to receive reminders via Outlook for scheduled breaks and events, and this effectively improved adherence results by an average of 2.5 percent.

During the software implementation, the workforce management team discovered the need for hours balancing in order to keep paid hours in check for the various types of agents within the organization. Tony took it upon himself to delve into the steps involved in

maintaining the rules and discovered a solution that is nearly maintenance-free. His solution was shared with Aspect Software, revolutionizing the procedures used in establishing these types of rules, and this shared information may have impacted many other organizations beyond The Principal with additional time and resource savings. Tony's acquired understanding of the rules paved the way for additional automation that empowers agents to self-schedule special events and trade equivalent schedules. The resulting time savings for the workforce management team alone are estimated to exceed 400 hours annually, which translates into a cost savings of over \$10,000, not to mention the improved accuracy and enforcement of system rules.

"Tony Graczyk's expertise and leadership in taking advantage of all that our workforce management system has to offer continues to be an asset as we look toward integrating other business units, even those that are outside of the call centers, into our workforce management system," said The Principal's Stephenie Tiedens.

As Director of Sales and Operations Analysis for International Cruise & Excursions, Inc. (ICE), Adelina Petrov has put her expertise to work to help generate results that have not only saved the company 2.5 million in the last year, but have also enhanced the ability of ICE's agents to do what they do best: sell. ICE, a private cruise and vacation club, provides vacation fulfillment services and its profits are made through commissions on booked cruises, resort vacation packages and related services. Since Petrov came on board in 2005, her primary mission has been to improve the ICE contact center.

Petrov immediately recognized the missing piece of the puzzle: workforce management. She was familiar with what workforce management could do from her previous 10 years of experience in the airline industry. However, getting management buy-in on a workforce management system in an organization that's never used one before was tricky. Petrov sold management by presenting a course on "Workforce Management 101," detailing how measuring and improving key workforce metrics would translate into large cost savings as well as increased revenue generating potential. Her preliminary estimate was that ICE would save approximately a million dollars a year by deploying a workforce management system

and supporting processes.

Once she had management buy-in, Petrov managed the project from start to finish. But Petrov's original ROI estimate didn't quite come in where she expected, however. The company ended up with an annual savings of more than double her prediction. Several key improvements contributed to this achievement. New compensation plans were established to re-focus on productivity. And once ICE was actually able to measure agent schedule adherence, it found that it was at 78% — significantly below where the company wanted it to be. After five months of using the new workforce management, ICE was able to bring schedule adherence up to 91 percent, then further to 92 percent in another several months, and then to where it stands today at 92.5 percent. As a result of improved performance and efficiencies, ICE operated the first quarter in the year post-implementation with less full time agents compared to the previous year on the same call volume and average handle time. This translates into a cost savings of approximately \$2.5 million dollars.

Agents have been empowered to perform better and achieve higher commissions and, as a result, attrition has declined from 11 percent to 5 percent per month. ICE's initial investment in its workforce management system repaid itself within four months. Finally, and most important, ICE's revenue generated by vacation sales grew by 22 percent in the first quarter of 2007 compared to the previous year.

Jeremy Rowley of ICE says, "Adelina is always looking forward to the next challenges. Her next dream is to optimize the outbound part of the call center workforce and to help us find the best e-learning tool to further increase agent productivity and enhance the company bottom line. She is joining efforts with the rest of the management team to continue providing a superb customer experience and preserving the core value of ICE as a great place to work."

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 2008 SWPP Annual Conference, which will be held March 26-28, 2008 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).

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