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SWPP Announces Finalists for 2009 Workforce Management Professional of the Year Award

NASHVILLE, TENNESSEE – March 27, 2009 – The Society of Workforce Planning Professionals (SWPP) today announced the five finalists for the 2009 Workforce Management Professional of the Year Award, which recognizes a workforce management professional who has shown outstanding leadership in the industry. The finalists are Richard Brooks of Bright House Networks, Ferenc Cstatlos of Nationwide Insurance, Donna Edwards of Sears Holding Corporation, Drexel Fitzwater of Vangent, Inc., and Matt Langford of Experian Consumer Direct.

“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.”

Richard Brooks was recently promoted to Director of Customer Operations at Bright House Networks, a position which includes responsibilities around WFM, Reporting & Analytics, and Vendor/Outsource management for the company’s Tampa Bay Division of five regional contact centers.

With the growing concern in business to gain efficiency where ever possible, in 2008 Bright House Networks began to aggressively determine ways to add efficiency, but only in ways that would also benefit the company’s effectiveness to serve its customers. One proposal brought to the table by Richard was to consolidate the regional workforce management (WFM) teams in each of the five internal contact centers into one centralized group at the Division level. This meant taking the everyday duties and responsibilities of 18 WFM Coordinators and consolidating it to eight WFM Coordinators. The annual savings on the

salaries of the team alone is over \$375,000.

Another huge return from this proposal was the ability to make WFM policies standard across all our centers. While the creation of schedules and forecasting had always been handled at a Division level, the day-to-day enforcement of WFM policies and procedures relied on the regional contacts. This had been the structure since the time that Aspect eWFM was installed approximately 3 years ago, so getting all groups to align processes and policies was not a simple task.

Richard drafted the proposal and presented the plan and inherent resource savings to Division leaders. The proposal was approved and an aggressive five-to-six week transition plan was put into action. The Division WFM team has now been in place for over 90 days and the efficiency gains have been immense. They have aligned processes and procedures beyond the core WFM items that were initially planned. The team has also taken on Division-wide alert style communications for staffing and queue variations from forecasted volumes. This was something that did not exist pre-consolidation and has helped to unify and filter Division level communication.

According to Steve Ledlow, Administrative Services Manager at Bright House, “This is just one example of how Richard’s constant contributions have helped make the workforce management structure amazing, but I think that with the current economic conditions that companies are facing, it is a great example of how someone took initiative and helped make changes that benefited the company both financially, but also functionally. Richard is not only a dedicated employee that always places the satisfaction of the customer at the forefront of his mind, but in addition he uses his analytic strengths to always find the best method of solving a problem, not just the fastest.”

Ferenc Csatlos currently serves as Director of Workforce Management & Operations at Nationwide Insurance. He started as a Customer Service Representative, and has been supporting call center operations since 2002, and has served in several roles, including operations manager, senior workforce and operations manager, and regional call center

technology manager. He has a great knowledge of managing call centers, which enabled him to bring a different aspect to the workforce management team. His vision: "Develop and implement consistent best practices across business units and Call Centers." As the leader of the current workforce management team, he helped one business unit to reduce operating expenses by \$2.4 million dollars within nine months by partnering with business leaders and identifying operational efficiency.

Ferenc joined the Nationwide PCCS (Property Casualty Customer Services) workforce management Team in March 2007, supporting the Claims business unit. Within his first year he partnered with business unit leaders to identify workforce management and call center opportunities. Bringing an in-depth workforce and call center technology knowledge, Ferenc was able to improve the overall productivity of the call center from 3.74 calls per hour to 4.45, which enabled the business unit to reduce operational expenses by approximately \$2.4 million.

Several workforce management teams were consolidated and Ferenc was named the leader of the new workforce management team supporting four business units and approximately 3000 associates across 18 locations. His vision is to develop a first-class workforce management operation by developing and implementing consistent best practices across business units and call centers. He believes to achieve this vision, the team needs to focus on the fundamentals of WFM. He identified three core foundations: daily operations, short term staffing and capacity planning and long term staffing and capacity planning. By partnering with business leaders, he re-engineered and developed processes around these core functions. New processes have been implemented across all the call centers, which enabled the business units to provide consistent world class customer service, while reducing operational expenses.

Ferenc created three detailed documents to share this knowledge: one on WFM Short Term Capacity, one on WFM Long Term Capacity, and one on WFM Daily Operations. These documents encompass almost 50 pages, and provide detailed information on each process in the workforce management area, so that everyone can understand how everything works.

Donna Edwards of Sears Holding Corporation knows contact centers. In her nearly 20 year career, she has worked with nearly every aspect of the contact center from her first job where she set up and started an entire contact center from scratch to her position now with Sears Holding Corporation, where she supports Aspect eWorkforce Management for the entire call center network. Donna spearheaded a nine-month project to implement better forecasting procedures and methods. Prior to this project, all forecasting was done using spreadsheets across 36 different lines of business, which was both an extremely labor and time-intensive process. At Donna's direction, her staff completely rebuilt the historical models for all lines of business in order to create a better forecasting system and do better analysis and planning overall. As a result, manual forecasting processes that once took one full week to finish have now been cut down to 30 minutes.

Donna also worked together with a team of other workforce managers to take a very data heavy staff adjustment program and write an application that would help them to right-size each new staffing center by using intra-day and interval staffing models and also determine how to route traffic through to each respective center. By using the data reporting system that Donna and her team implemented, Donna was able to identify 16 individual pain points in the system that were going unaddressed. She was sent to one center to fix some problems, armed with all her reporting data. After spending just one week at the contact center with her data, Donna was able to fix the problem and the contact center's service level increased between 30 and 40 percent as a result of the fix. At another center, Donna was able to reduce the costs of calls in a center that typically received 400,000 calls annually that averaged \$2 per call by 30 percent by creating better staffing models.

Currently, Donna is working on implementing a more skills-based workforce management system, creating an internal workforce certification program and implementing blended offline, chat, Web-based and email contact systems. The upgrade to a skills-based workforce is expected to save Sears Holding 7 FTE positions and \$200,000 annually.

Daniel Pham, Director of Workforce at Sears Holding, said, "We at Sears Holding believe

that Donna is the kind of standout employee that should be recognized for her efforts—as far as we’re concerned, she truly is the Workforce Management Professional of the Year.”

When Drexel (Drex) Fitzwater joined the Vangent team in November 2007 as Program Manager for Workforce Management, the organization had a nascent workforce management program that had not kept pace with the rapid growth the program had experienced. The center successfully met the metrics of their contract with their client, but few initiatives were in place to improve staffing, manage queues in real time, or properly notify key team members of unexpected deviations in performance. The contact centers were using Aspect eWorkforce Management; however, the system was a shared system and had not been fine-tuned to account for the 3,000–4,000 customer service representatives employed on this program.

Understanding that improving efficiency in the contact center meant improving the technology and understanding of workforce management, Drex began to overhaul both the technology and the fundamental understanding of how it can be used by the entire organization. In reviewing the program needs, he set an ambitious course to roll out several modules of the Aspect suite within the first few months of 2008 and align his organization for success.

Because there was no central tracking mechanism to allow a consolidated view of requests, approved employee time off was difficult to manage. Baseline data gathered before implementation showed that some centers were occasionally experiencing over 20% absenteeism on single days. To address this problem, Drex began implementation of the Aspect Empower module. During the roll out, he and his team focused on teaching Operational staff how to utilize this tool and how the processes would be managed and maintained. The roll out effectively changed not only the way staff was accounted for and time off or exceptions were granted, but allowed staff to feel part of the entire center, not just their group. Drex understood that in rolling out a program like this, he was not only introducing a new technology, he was changing the culture of an organization. Drex and his team created training materials that emphasized the transparency of the process, and the

benefits to Customer Service Representatives (CSRs) and managers. Since this roll-out, Vangent has reduced and maintained the absenteeism to about 12% on average, which has helped the company meet financial goals and service levels consistently.

At the same time, Drex began to review staff schedule adherence metrics to determine how they could align with industry best practice. During the first measurement period, he found that schedule adherence for the entire enterprise was around 45%. The CSRs were not following their schedules and supervisors and management had little way of tracking where their employees were and what they were doing. He then worked with the technology staff to install and configure the Aspect Real-Time Adherence module. As they rolled out this functionality, Drex oversaw a comprehensive training program that was rolled out to all management. It provided immeasurable insight into the activities that employees were engaged in and the company saw a remarkable improvement. Schedule adherence reached 85% per month in less than one quarter, and they have improved upon that success — some centers are now successfully maintaining over 90% adherence.

Matt Langford is Workforce Management Command Center Supervisor at Experian Consumer Direct. Matt saved the company hundreds of thousands of dollars by developing an internal workforce management system.

Matt has written software that Experian calls “WhereStaff.” There isn’t a single department within Experian that doesn’t depend on some part of WhereStaff, which includes the following features:

- Attendance every 15 minutes
- Real Time Schedule Adherence every 3 minutes
- Real Time Dashboard at all of the Supervisors Workstations
- Calls Per Hour by Agent
- Average After-Call Work
- Adherence
- Schedules

- Schedule Exceptions
- The General Productivity of Agents

The Experian workforce management team provides schedules to three call centers with up to 1000+ agents with multiple skills, clients, workloads, and business needs. Matt has integrated the schedules into all of the software's other components including some very nice forecasting tools. The whole suite of programs, which is written in Microsoft Excel, is very powerful and have stood up to the test and proven efficient results.

Many companies and auditors have come to the center to look at the tool Matt created. A sister company from the UK flew all the way over to see it. The company's senior management continues to be amazed at the results of Matt's efforts, and they have even had other companies call and ask if they could get a copy.

Matt is always working to help develop the other members of the team. He has started a library in the office filled with books on Visual Basic to Project Management. He is teaching the other members of the team how to maintain the existing infrastructure, and helping others to build their own Macros. He is a mentor to the entire workforce management team.

"Matt Langford is not only a success — he makes other people successful," according to Jason Oliver, Workforce Manager at Experian. "Our call center continues to be a success thanks to Matt and his ability to not only lead through technology, but through the success of our people."

The SWPP Board of Advisors selected the five finalists from nominations submitted on the SWPP website. The workforce management Professional of the Year award is chosen from the five finalists by the Board of Advisors and announced at the 2009 SWPP Annual Conference.

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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