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## **SWPP Announces Finalists for 2010 Workforce Management Professional of the Year Award**

NASHVILLE, TENNESSEE – March 30, 2010 – The Society of Workforce Planning Professionals (SWPP) has announced the five finalists for the 2010 Workforce Management Professional of the Year Award, which recognizes a workforce management professional who has shown outstanding leadership in the industry. The finalists are Dave Bennett of American Express, Alisha Eads of Asurion, Tony Graczyk of Principal Financial Group, Victoria Marcella of VW Credit, and Angela Thomas of FedEx.

“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 delivered measurable results for their companies.”

Dave Bennett is the Regional Workforce Planning Manager at American Express based in Sydney, where he leads planning activities across 13 sites in the Asia Pacific region (JAPA). Dave has 14 years international experience in the contact center industry. In his current role Dave is responsible for strategic resourcing, budget and capacity planning, and the forecasting and scheduling across 11 countries.

His key accomplishments at American Express include: the introduction of agent self-serve software to assist with shift trading and holiday allocation; a flexible resourcing strategy based on the "Lifestyle" survey; adopting statistical analysis software to improve forecasting; creating a capacity planning tool for all American Express centers internationally; and leading Contact Center Health Checks at centers in Sydney, Hong Kong, Kuala Lumpur,

Tokyo, and the UK. Most recently Dave has launched a major program within the region to fully integrate Service Level Planning functions.

In response to considerable financial pressure across the organization, Dave's group was tasked with significantly reducing operating costs in 2009 in order to maintain profitability. Towards the end of 2008, Dave played a significant role in ongoing international discussions aimed at identifying opportunities to reduce costs. Highlights of his contribution include presenting a discussion paper on proposed service level changes to the Customer Service Delivery International Leadership Team and collaborating with his international counterparts to create a calculator to assist leaders with calculating the potential in their markets to reduce costs through improved operational efficiency.

In January 2009, the culmination of these ongoing discussions was a request from senior leaders to establish a single view of capacity plan requirements for every market. The regional workforce planning teams were quickly pulled together to share the brief and request an urgent turn around. Without hesitation, Dave shared the JAPA capacity planning template with his colleagues overseas and it was agreed that this should form the basis of the new regional templates. Work commenced on populating the templates for each region in record time. Immediately, Dave led from the front on the challenge at hand. His team started working round the clock to populate the tool with JAPA data. In addition to this, he worked on the design of the template and incorporating enhanced features. Over the following days, Dave routinely progressed the template and passed it to his overseas colleagues to populate the template as they arrived to work each morning. It is important to note that Dave was not asked to work on the template for other regions but chose to do so in order to help his colleagues move faster towards the end goal.

At this stage the new template became known as the International Capacity Plan and requests were quickly coming in to enhance the functionality, aesthetics, and build a user-friendly interface. Dave's expert knowledge of workforce planning principles and Excel meant he was able to adapt the model in a fraction of the time it would take others to do so. Throughout the process, he showed ingenuity and creativity to produce a tool which far exceeded the

expectations of his customers.

In the final days before the launch of the tool, Dave worked round the clock to deliver on time. This coincided with the upgrade of Aspect eWFM across the region. Consequently on the final day, Dave worked from 6am on Thursday morning until 2am the following morning. Three and a half hours later he was back in the office presenting to the team on an international conference call. The day in question was his birthday!

In the words of Ron Oestreicher, Senior Vice President at American Express, "We said it on the call but I want to thank you all for an outstanding job tonight. The work you have done over the last few days is incredible. What I enjoyed the most about the call is the global leadership, pride, and high engagement that came across the phone from each of you very naturally." Thanks to Dave's leadership and the contribution of the international team they had pulled together in just over a week a single view of capacity plans across international markets, something which had not been available in the last 50 years.

During the three years that Dave has spent in the JAPA region, he has presented on the subject of Workforce Optimization at a series of industry conferences in Australia and Asia. He is a strong advocate of Workforce Planning and is always striving to find new ways of selling the benefits to an audience. He was recently appointed a member of the SWPP steering committee for the Australian market. Dave holds a Bachelor's degree in Psychology from Liverpool University and a Master's in Management from Manchester Business School. He has recently completed CIAC accreditation as a Contact Center Operations Manager.

Alisha Eads, a 16-year veteran of the call center industry, has been with Asurion as the Director of Workforce Management for nine years. Prior to Asurion, Alisha was employed with CMC, Stream International, and eToys. Alisha has worked her way through the workforce management ranks, beginning her career as a Workforce Analyst. Her current responsibilities include interval forecasting, scheduling, and real-time queue and service level management across all of Asurion's North American sites. In addition to Workforce Management, Alisha also assumes responsibility for the Time Keeping team, which is

accountable for maintaining payroll hours. She leads a team consisting of one Senior Manager, one Manager, two Supervisors, six Schedulers, 16 Real-Time Analysts, and three Time Keepers.

Throughout 2009, Alisha has, once again, accomplished the seemingly impossible. She has been involved in a large number of strategic projects that have served to increase operational efficiencies as well as promote Asurion's unwavering commitment to the customer experience. In 2009, Alisha accomplished many goals, including:

- Met service level agreements for all lines of business in every month while exceeding efficiency targets
- Turned down an outsourced facility and rebalanced in-source / outsource mix while exceeding efficiency targets and SLA's
- Implemented reporting to increase the communication between Workforce Management and Operations
- Instituted an advance planning methodology including a three- and seven-day forecast revision process allowing WFM and Operations to work together to make necessary tweaks in staffing to ensure service level is met and efficiencies are maximized
- Finalized the consolidation of the WFM function from decentralized, residing in six different locations, to a centralized model out of one location
- Reorganized scheduling and real time teams to ensure that each team member was assigned to own a specific client or clients within their area of responsibility which generated savings of over \$100,000 annually
- Developed a holiday planning and scheduling practice that ensured that service level, operational efficiencies, and employee satisfaction were balanced
- Deployed PTO/VTO /OT management process that increased efficiencies by over 2%
- Grew Asurion's Work at Home model by nearly 120% and implemented creative scheduling techniques with this team resulting in increased efficiencies
- Converted the primary time tracking system from eTime to Kronos across the enterprise

- Reorganized the Time Keeping department resulting in a 50% reduction in staff within this organization

With all of the above, Alisha was able to secure some very impressive results in 2009 at Asurion:

- An overall Frontline Service Level of 82.8% with 70% of all days hitting a service level between 78% and 85%
- Frontline ASA of 19 seconds on 22 million calls answered
- Abandonment rate of less than 1.8%
- Annual attrition at a record low of 48%
- Annual efficiency of greater than 70% which includes efficiencies greater than 74% within our four largest queues. This is more than a 5% improvement since 2007.

Alisha has also managed Asurion's staff planning and real-time management through some significant changes in the organization's multi-channel strategy. This strategy effectively reallocates volume away from the CSR to automated channels such as the WEB and IVR. Asurion realized significant gains in the automation area in 2009 and Alisha was consistently able to keep up with the volume fluctuations by reallocating staff and moving hours within the system.

Bawa Singh, Vice President of CARE Support for Asurion and Alisha's current leader, had this to say: "Alisha is an amazing workforce management leader. When faced with any size challenge, she tackles it head on with a determination and resolve that is exhilarating to those around her. She inspires her team to accomplish nearly impossible tasks. Her peers look to her for creative answers for large and complex issues. She is always willing to put in the extra time and effort to exceed the expectations of both her internal and our external customers. Her professionalism and devotion to Asurion put her in a class by herself. Just like Babe Ruth pointing to the center field wall, she calls out her SLA and then hits a home run right to the spot that was expected. Balancing KPIs like SLA, occupancy, attrition, and employee satisfaction can be a daunting task yet day in and day out, Alisha manages a team

that makes it look easy. I am certainly excited and pleased to recommend Alisha Eads as the SWPP Workforce Management Professional of the year."

Since joining Principal Financial in 2001, Tony Graczyk has played a key role within the success of the contact center, and throughout the company. Starting as a frontline agent, Tony has now been a Contact Center Workforce Management Analyst for the past four years and he is primarily responsible for supporting the forecasting, scheduling, and tracking needs of one of the retirement plan administration call centers.

The Principal is a leading global financial company offering businesses, individuals and institutional clients a wide range of financial products and services. The organization was in need of a system that could compile and organize all of the staffing processes into a controlled database. The business unit that Tony primarily supports employs nearly 1,000 agents, with around 130 people on the phones and the remainder doing various types of back-office work. As Tony discovered, different work types have different seasons of peak workloads. Sometimes people would need to be pulled in from the back-office to assist with phone coverage, and sometimes phone resources were in abundance and could be effectively deployed to assist back-office areas. However, there was no way of tracking how many people were needed, where they would be most proficient, where they should be assigned, etc. Moreover, when assignments were made, the lack of tracking of those assignments caused employees to be unsure of their current role, or worse, assigned to assist two or more areas at the same time unbeknownst to management establishing the assignments.

With all of those challenges in mind, Tony established the Swiss Army Team (SWAT) database at The Principal. This staffing database contains information about an employee's work history, proficiency, skills, location, etc., and helps leaders determine who would be most suited for various situations. All of this information is conveniently loaded in one place and provides call center managers the ability to identify gaps in the various areas of the business unit. In conjunction with the workforce management forecast for phone needs, back-office areas can enter staffing needs into the database. Once the needs are identified, the collective information contained in the database illustrates where resources are in excess

and where additional assistance will be needed to maintain service goals. The employee information from the database helps management identify resources from areas that have extra capacity that may be well suited for the assignment. Because the forecast for the various areas of the business unit can be entered months in advance, the plan is in place proactively and can be established to allow for adequate time to complete training for the areas needing support.

Prior to the SWAT database, in the few instances where employees were allocated to work in another area, their performance in the assigned area was overlooked on annual reviews because there were no means to track their assignment, the leader during the assignment, and how well they performed the duties. In many cases, the loss of time from their primary role caused their annual performance to look worse than their peers. Within the SWAT database, leaders of the redeployment are able to provide feedback and can be solicited for additional information about the success of the assignment. They also have the option to code their desire to "invite" employees back on future assignments, which certainly boosts morale.

Due to the efforts of SWAT, The Principal has been able to look internally to address the common issue of managing peak workload. By redeploying existing staff, overall costs can be reduced and service consistency can be maintained. For example, the average speed of answer for inbound phone processes would vary by up to 30 seconds (over 85%) from peak to non-peak workload. By redeploying employees, the variation has been reduced to less than 10 seconds (less than 30%). Since implementation, the monthly deployment of resources has only accounted for nearly 0.5% of the workforce in the supported business unit. The estimated cost savings for this area from the ability to redeploy existing resources is conservatively estimated at 1.5 million dollars annually. The reduced need to hire and train, more streamlined planning process, more consistent service results, improvement in employee morale, and cost savings resulting from the concept have paved the way for an innovation in processes and a more efficient and knowledgeable workforce.

According to Mike Daugherty, Assistant Vice President at Principal Financial, "Tony Graczyk possesses a unique set of skills and traits that have helped make him successful in

his role at the Principal Financial Group. Tony's technical background, combined with his sharp analytical skills, has proved to be a killer combination for helping improve forecasting and scheduling in our contact center. His proactive leadership, desire to learn new things and his foresight have been invaluable in allowing us to create new cost efficiencies across the center, as well. His willingness to always be of help to his managers and peers makes him the kind of team player that every organization seeks.”

Victoria Marcella, a 12-year contact center veteran, plays a key role in helping VW Credit (VCI) deliver its mission. As the Workforce Management manager, Victoria oversees forecasting, scheduling and tracking activities covering four contact center sites in Portland, Chicago, Auburn Hills and Montreal.

The Workforce Management team started working with the Customer Accounts department in 2008. In 2009, the partnership started to really produce benefits. These benefits have been demonstrated through the reduction of network costs, improved intra-day performance and more efficient use of resources in the department. Creating a successful partnership was a challenge that provided several obstacles for Victoria to overcome. First, Victoria had to gain acceptance from a management team in the department that was reluctant to utilize WFM because they felt they were producing more than adequate results on their own. Victoria was instrumental in developing relationships with their managers and was able to demonstrate how they could utilize WFM. Once they were convinced that it was worth their while to utilize the WFM team, the challenge then became to prove the value they could add. Victoria had to work diligently on getting the entire behind-the-scenes system configuration completed while at the same time working on requests for the Customer Accounts department. One of the first requests was to look at their schedules.

This provided a unique challenge since, unlike our Customer Care department, they do not just take inbound calls. They also use an automatic dialing system and need to make manual outgoing calls. Finding the balance so that the requirements were met for all three tasks while still delivering schedules that the management team felt were convenient for their employees was quite an accomplishment. Since those initial schedules were released, Victoria has

worked closely with the managers on a daily basis in order to meet their changing needs.

Jason VanHeirseele the Section Manager for Customer Accounts had the following to say about his newfound appreciation for the service that WFM has provided his department:

"Since partnering with WFM a little over a year ago, Customer Accounts has been able to streamline many internal processes -- processes that previous to WFM's involvement were time consuming and manually driven. Being able to shift responsibilities such as monitoring late starts, breaks and schedules, have given more time to our supervisors to do what they do best, manage teams and collect funds. With WFM we've also been able to centralize and manage our scheduling and call volume more effectively. Workforce Management provides extremely beneficial data that helps our department make timely decisions. This is in large part due to the folks managing the software. Communication is a key component and our department works very well with all folks involved with Victoria's group."

The continued success of the partnership between Customer Accounts and Workforce Management has been noticed around the building and has led to interest from other departments as well. Victoria is continuing to place her WFM team in a position to grow and succeed.

Victoria has been able to bring through several internal employees from multiple areas of the company to shadow with WFM. This provides a better overview of what we do on a day-to-day basis, as well as potential career opportunities. To date, 25 candidates have participated in shadow time with the WFM Department.

Victoria has also implemented a standard process for educating Customer Care new hires about WFM, which includes a two-part, 30-minute presentation along with a Power of One activity. She has also implemented a Roundtable Meeting for our veteran employees that provides an opportunity to ask any questions they may have. This process gains exposure and a better understanding of the WFM team.

These are just a few examples and highlights of the how Victoria will seek out an opportunity

to ensure anyone she comes in contact with fully understands the importance and the benefit of eWFM. Her team feels she is passionate as well as a true advocate for WFM and is clearly deserving of this prestigious honor.

When asked about Victoria's accomplishments and values, her manager, Sope Reang, stated: "Victoria Marcella has been and continues to be a valuable member of not only our department, but our organization. She approaches Workforce Management as a challenge and uses problem solving tactics to resolve issues while recommending business solutions to our customers. In addition to her ability to think analytically, she possesses a strong work ethic and commitment to her role. Despite any issues that may arise, she consistently maintains a positive attitude and demeanor."

Angela Thomas has been supporting customer service workforce management at FedEx for the last 15 years. In those years, Angela has learned and gained knowledge in all aspects of customer service and workforce management. Recently, however, Angela has spearheaded a huge undertaking that has changed the call center environment at FedEx — Angela successfully deployed four traditional call centers to be 100% at home employees. The overall savings for this initiative will be roughly \$2.5M annually. Angela utilized the latest in call routing technology to enhance the overall scheduling and routing of call volume, which has led to an overall 1% increase in productivity. This has provided the company with an additional \$1.2M savings per year, for a total initiative savings of over \$3.5M annually. This initiative has had a number of significant benefits for FedEx, including:

- Employee morale around this opportunity has been overwhelming, and the employees are ecstatic about the opportunity to work from home
- Employee loss of coverage (absenteeism) is down by 45% versus the traditional centers
- Facility savings are \$2.5M annually
- Increased online productivity savings of \$1.2M annually
- Service levels have realized a 1.2% improvement overall supporting enhanced customer experiences

Also, disaster recovery opportunities have been realized to eliminate the impact from severe weather and increase flexibility and employee support for contingency planning during off hours and in critical times.

Angela has led the planning team in creating the scheduling processes for this initiative, as well as developing the requirements for the employees to be working from home. Angela had to utilize a great deal of both technical and workforce management skills to support this initiative and to ensure that requirements have been met. This includes developing online scheduling practices for all aspects of workforce management, and creating two-way communication channels for employees to ensure that all issues are resolved. Angela has also developed the reporting and routing strategies to be deployed in conjunction with the rollout of the remote employees. This strategy has improved overall call routing and productivity across the deployed locations. This strategy has also been adopted for use while deploying an additional 400 employees to work remotely from home within the next six months.

Angela led the Operations team in deploying proactive Chat opportunities on fedex.com. This has allowed FedEx to effectively support customers utilizing fedex.com, which has had a significant impact to customer satisfaction, including:

- Customer satisfaction surveys are scoring consistently in mid to upper 90 percentiles
- Job diversification for traditional phone Reps has been overwhelming
- Chat Reps have provided additional contingency staffing in peak and critical time periods

Angela also was highly involved in the Chat project for workforce management. Angela developed an integrated routing and chatting strategy to ensure that the Reps can be dual-utilized to maintain their current productivity levels. Angela also developed new forecasting and planning strategies that will encompass multiple simultaneous chats, and worked with the IT department to ensure that the Reps can be utilized most effectively to support inbound

call volume as necessary in peak and contingency situations.

Angela has utilized multiple workforce management tools in completing the various projects that she has been involved with. She has developed requirements for the workforce management tools to be interactive for both remote and in-office employees. Angela has also developed internal programs that will allow more effective communications and interactions between Reps, Managers, scheduling specialists, and network analysts. These efforts have provided increased communications, which has more effectively addressed issues for individuals, as well as effectively being able to communicate network needs to multiple call centers and over 400 employees currently working from their homes. Angela has worked with various levels of executives and presented numerous recommendations in order to support these initiatives, including not only all of the scheduling opportunities and challenges, but also the financial risks and opportunities.

Angela has been very effective in completing a number of major corporate initiatives in a very short time period. She was able to deploy the 400 remote Reps within a five-month time period, utilizing technology that was new to FedEx and that required full integration into all of the existing reporting and WFM systems. This project was so successful that the decision was made by the executive team to continue with the initiative and deploy an additional 450 Reps to work remotely over the next four-to-six months. In addition, Angela has been responsible for the day to day operations for FedEx within the United States, and took the lead role in managing FedEx Customer Service through the Christmas season.

Dave Loges, Senior Manager, Workforce Management at FedEx, said, “Angela has been a tremendous part of the success that FedEx Customer Service has experienced. Over the last year, Angela has taken a tremendous leadership role while still managing the day to day operations for customer service. Her leadership on the corporate initiatives was both key to their success, as well as ensuring that the initiatives were effectively integrated with the workforce management needs. She has actually been able to enhance the customer experience while bringing tremendous cost savings to FedEx.”

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 2010 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](http://www.swpp.org).

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