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SWPP Announces Finalists for 2011 Workforce Management Professional of the Year Award

NASHVILLE, TENNESSEE – March 23, 2011 – The Society of Workforce Planning Professionals (SWPP) has announced the five finalists for the 2011 Workforce Management Professional of the Year Award, which recognizes a workforce management professional who has shown outstanding leadership in the industry. The finalists are Matt Pitts of Bluegreen Corporation, Jackie Reeves of West Corporation, Greg Samos of Computershare, Sean Stewart of Permanent General, and Jonathan Waller of Good Sam.

“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.”

Matt Pitts has been a leader within the Bluegreen WFM team since 2007 where he oversees the inbound volume forecasting for nearly 50 call types within 4 different departments. Starting as a customer service phone agent, Matt has 13 years experience in the call center industry; of which 11 years are in workforce management with an extensive background in real-time management. He is Bluegreen's subject matter expert for TotalView IEX and Symposium Call Center Management, as well as liaison to the Telecom department for all divisional telephony requests.

In 2009, the WFM team was given a challenge to get even more creative with associate schedules. The directive was just another component of a global “do more with less” theme in the midst of struggling economic times. Within a short period, Matt had led his team in developing a fairly robust Flex Scheduling pool of phone associates.

The biggest challenge to successfully implement this commonly-used concept was the existing culture and mindset within Bluegreen's contact center. To provide a little background, Bluegreen's hours of operation are 8AM - 9PM, Monday through Friday and 9AM - 5:30PM Saturday. The 13-hour business day lent itself to traditional 8-hour schedules overlapping during the mid-day and often causing staffing overages. Since 95% of the associates are full time at 40 hours, WFM desired a large pool of part-time associates to offset the overages. However, the 160-hour new hire training, vast resort knowledge, complex systems and customized customer service expectations do not make it easy to keep part-time associates who are just looking for an “easy second job.”

Matt and his workforce team partnered with the operations department to target 20 to 25 associates (or 25% of the targeted department of associates) who were willing to flex 30-40 hours worked weekly while providing 50 hours of schedule availability. Under Matt's diligent leadership, a flex-scheduling program evolved and was tested for 90 days during the 2nd quarter of 2010. Matt was able to extend a shift differential to pilot participants to include \$1.00 per hour for weekday flex plus an additional \$1.00 per hour for Saturday availability. After modeling, Matt was able to demonstrate the ROI for the shift differential to show a payroll savings in number of hours worked per associate and efficiencies gained by the program. He also proposed flex-schedule participants get first rights at vacation bidding. another strong motivator for program involvement!

Matt also partnered with Human Resources to have participants sign an acknowledgement form and make a commitment to participate. He also trained them on the details of the flex-scheduling; how to mark their availability selections, submit schedule change requests, and use the program to their personal benefit.

During the pilot program, Matt and team realized a savings of 1087 scheduled labor hours; an estimated payroll savings of \$16,500 with only 20% of the department in a 3-month time period. The average associate worked 33 hours weekly; a total savings in 3 months of 84 hours per associate. The increased ability to efficiently place schedules decreased overtime

needs by 600 hours; an additional estimated payroll savings of \$13,500 in 3 months. or nearly \$54,000 annually.

The pilot program was a hit for both WFM and associates and flex-scheduling has become a permanent part of Bluegreen's scheduling options. Associates willingly volunteer to participate on a quarterly basis and the flex team is now approximately 30% of the targeted department. All new associates are now hired in as part of the flex team.

According to Angela Blevins, VP of Club Services, “Matt excels in his mastery of effective and positive communication. He has a gift for human relations and makes a favorable impression and can easily gain acceptance by others.” She adds, “Matt is well respected by the senior management team and strives to work harmoniously with each department.”

Jackie Reeves has been a member of West Corporation's workforce management team since shortly after the company was founded in 1986. In her nearly 25 years of service, she has played an integral role in shaping departmental policies and procedures. In Jackie's current role of WFM Manager, her team manages workforce planning for a group of over 1,000 brick and mortar agents across 4 US locations and 2 Philippines call centers. Jackie's team is also responsible for WFM activities associated with over 3,000 virtual, work-at-home employees. Being an outsourcer, West's WFM teams need to be flexible and creative to adapt to changes required by our customers. Jackie supports approximately 25 skill groups representing diverse verticals including financial services, healthcare, mobility, conferencing, retail, utilities, direct response marketing and TV shopping channels. These customers represent approximately \$34 million in annual revenue for West.

Jackie is tasked with managing some extremely challenging seasonal ramps to support her customer's needs. In 2010, she had to coordinate hiring, training and staffing plans to support two shopping channels and one large seasonal retailer which called for 75-120% increase in baseline staffing over a six week period. In addition to these known ramps, Jackie was asked to manage staffing plans to support a major appliance recall project. Jackie coordinated forecasting, hiring and scheduling efforts across two call centers and a virtual

center to deliver 1500 new agents in only six weeks. Her team work and sense of urgency on this project enabled us to process over 650,000 calls for this recall program.

Jackie continuously seeks for strategic and tactical process adjustments to drive profitability improvements. This year she has partnered with internal customers and our shopping channel clients to improve our forecasting and staffing process. These two customers request hundreds of weekly staffing adjustments which traditionally have had a negative impact on our occupancies. Jackie's team compiled and presented data that showed the KPI impacts from specific show forecasting inaccuracies and late change notification. By leveraging remote agents and adjusting the timing and levels of staffing requests, Jackie's team was able to improve agent efficiencies by 6.4% in 2010. These operational improvements resulted in approximately \$325,000 in annual labor savings.

Similarly, Jackie provided increased oversight on our hiring and staffing strategy for a holiday retail program which is historically challenging to balance service levels, sales acquisition and occupancies. Improved diligence in the staffing blend combined with implementation of an automated system enhancement where virtual agents can bid on recurring schedules enabled us to reduce labor exposure by nearly 10% or \$243,000.

Jackie is always looking for ways to continuously improve departmental efficiencies while not sacrificing customer service. To this end, Jackie has been integral in assisting with designing feature functionality for the Spectrum WFM software. Jackie has been named on two pending patents for flexible scheduling and in 2010 assisted in rolling out several new software features including recurring schedule selection for work-at-home agents and an automated schedule change request process. Due to her assistance in designing these flexible staffing solutions, Jackie was able to accomplish her 2010 WFM initiatives without conducting a shift bid. As such, Jackie manages a team of five WFM analysts which equates to a remarkable 800:1 agent to analyst ratio.

“Jackie's commitment to customer service combined with her experience managing with unique client needs, varied revenue structures, offshore and remote agents make her an ideal

candidate for Workforce Management Professional of the Year,” said Craig Moser, West’s Director of Workforce Management.

Greg Samos serves as Manager, Workforce Planning for Computershare Worldwide, which has 2000 agents in six locations worldwide. Greg manages WFM for three sites and 400+ agents and has 10 years of experience in WFM. Over the course of his five years with Computershare, Greg has converted the WFP team from a "catch-all" group to a team of specialists building a comprehensive plan for the business to achieve their goals and handing it off to the business to execute that plan as they see fit, while supporting them with information on the impacts of decisions being made.

Greg has developed structured processes around communication with the business, where the focus is on resource requirement rather than volume and AHT forecast variances. All WFP metrics provided to the business are in terms of FTE variance. Moving to FTE requirement variance has allowed for increased transparency to trust cost or cost-savings analysis. This allows the business to focus on the true impact of workforce management, and allows the WFP manager to manage the Forecast Analysts.

FTE variance is the most controllable parameter in the business. Volume is random and driven by unknown circumstances, AHT is agent and system-dependent, but how many agents are put on the phones and when is up to the business and largely controllable in a cross-skilled/blended environment.

Now, reliance on knee-jerk reactions due to forecast variances is now minimal and the business is more aware and confident in the plan. Discussions are geared towards plans, trends, and drivers rather than current anomalies.

Greg fully understands and communicates the differences in needs for certain departments and creates a workable solution for everyone. He produces a long-term forecast model that identifies the differences between what Finance wants from a budget perspective, while

providing the recruitment plan for each site which is what the call center needs.

He is also very involved in our workforce management solution, and has designed, planned, and performed a secondary implementation of our WFP software solution for an internal dedicated contact center. He created numerous algorithms which were built as automated scripts within the software for fulfilling business requests or administration of the software itself. And he is often consulted for theoretical, functional, or technical support internally and externally and network with peers

Nelson Hermengildo, Business Analyst at Computershare, says Greg has a “passion for WFP, a love of numbers and math in general. He has objective views, is a problem/puzzle solver with an internal drive to know ‘why.’ Greg always provides outside-of-the-box ideas leading to often unique solutions and cost savings.”

Sean Stewart joined Permanent General Companies in June of 2007 as a Workforce Analyst. Having come from a past career in workforce management, using familiar planning tools common in the industry, he was able to hit the ground running. Sean immediately assessed the needs of the customer service department and became familiar with the Community scheduling tool. While his predecessors were agile in the use of the planning tool, they struggled with the forward thinking part of the position.

Through open communication with his manager and other company leadership, he was tasked with running scenarios that would optimize the efficiency of the staffing for the department. During his time at Permanent General, Sean has run countless scenarios to identify the best way to ensure appropriate staffing, balanced with the need of the CSRs. He has been involved in helping the organization establish the optimal service level goals considering cost and benefits. He was intimately involved in the research and legwork and cost/benefit analysis of changing the call center from variable start times to fixed start times with schedules that are available 3 weeks in advance. This sole activity was likely one of the greatest wins for employee satisfaction since his time with the company.

Early in his career with the company, Sean was promoted to Supervisor of Workforce Management, and has since added two analysts to his area. He works closely with his staff, to guide them and teach them the thought processes necessary to be successful in their careers. He takes the time to listen to the needs of the staff, and considers all requests for schedule changes and vacations as they are requested. This is very important to the staff, especially when you consider that their job is one of rigid adherence. Knowing they need to use their vacation time to get a break from the hustle and bustle of our department, he tries to find ways to get the CSR's requests handled promptly while fairly considering all scheduling options. During 2010, Sean was awarded the Permanent General Departmental Leadership Award which is given by the CSRs. This is a testament to the respect and support he has earned from our staff.

Sean has come to know that in his profession, there is truly a mix of book knowledge and science, combined with art and creativity. It is this blend of talents that makes Sean successful as a workforce professional. Some firms approach the workforce management team as a necessary evil, not capturing the vision of what the area can do for the success of a company. Sean has worked with the senior management team throughout the past to study inbound call sources, first call resolution trends, as well as handle time by skill and tenure.

He was one of a small handful of industry experts to work with WFMSG to test the beta 3.6 version of Community prior to introducing it to the public, and was instrumental in the transition of the office to that latest version of Community. He also was involved in the rollout of a unified desktop application, helping the company realize a tremendous cost savings based on lower call handle times and training and understanding the implications to staffing models. His interaction with senior management was critical, as he helped to challenge staff to realize the efficiencies anticipated from that tool. He is counted on to offer his insight when determining staff levels based on budget projections.

“Beyond having the technical skills and thorough understanding of the workforce management process, Sean possesses the people skills and tact necessary to be successful in his role,” according to Wade Clark, Director of Customer Service at Permanent General.

“His combination of understanding the science of workforce management and using a creative approach when planning and fine-tuning staffing makes him a successful leader.”

Jonathan Waller has been with the Good Sam family now approaching 6 years. In early 2009, he was promoted from a Workforce/Call Center Analyst to his current position as the Manager of Workforce Planning. Jonathan is expanding his responsibilities in several areas including the integration of another center on the workforce management system, learning/managing a new Aspect inbound/outbound phone system and developing new practices to optimize efficiency.

In addition, the Center has gone through significant changes in the past several years and Jonathan not only adapted to these changes but found further ways to demonstrate leadership by taking the initiative to go above and beyond his traditional duties. Below are his most recent successes and key accomplishments.

- Implemented successful reconfiguration initiatives of the entire Aspect WFM 7.0 system while transitioning to version 7.3.
- Led a successful project in launching the Center into the next generation of workforce management via Aspect WFM Empower. Jonathan also developed the training curriculum and trained all employees.
- Co-developed and published a Center staffing/training plan that contributed to a core shift in culture to promote more effective budget planning.
- Proactively designed and published several Center performance indicator reports which contributed to a 60.7% improvement in average wrap time and saved 23 seconds in average handle time. This contributed to a total revenue savings of approximately \$171,000.00 over four months.
- Created, published and implemented an on-going monthly center WFM performance analysis report comparing monthly and yearly trending including: call volume, % to forecast, service levels, abandon, AHT, adherence, compliance, average wrap, not ready/off phone activity, turnover and staffing.

- Initiated and successfully implemented a new skill based routing plan for a level 2 team that resulted in a more efficient multi-skill staff. This plan also improved service level 4.2 points and decreased abandons 1.3 points.
- Proactively redesigned new forecast groups and staff groups that resulted in a more efficient multi-skill environment.
- Applied the "art" and "science" of WFM planning which lead to a 3.2% forecast accuracy in 2010.
- Developed and implemented a multi-phase workforce Team Lead training program. This helped to improve the connection between operations and workforce management producing a higher level of teamwork, communication and participation while expanding overall WFM knowledge.
- Directed a WFM "Daily Huddle" to proactively communicate intra-day performance indicators so management could make better informed decisions about real-time operational planning.
- Designed and implemented an audit/reconciliation process for time off requests resulting in 100% compliance.

Clint Britt, VP of Call Centers at Good Sam, said, "As you can see Jonathan has dominated our workforce planning program while on my team. Jonathan has shown character, leadership, and growth distinguishing himself both personally and professionally."

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 2011 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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