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SWPP Announces Finalists for 2012 Workforce Management Professional of the Year Award

NASHVILLE, TENNESSEE – February 29, 2012 – The Society of Workforce Planning Professionals (SWPP) has announced the five finalists for the 2012 Workforce Management Professional of the Year Award, which recognizes a workforce management professional who has shown outstanding leadership in the industry. The finalists are Chad Andree of CenterPoint Energy, Robert Dobson of InterContinental Hotels Group, Michael Ellis of Suddenlink Communications, Kristin Goldman of Ameriprise Financial, and Cynthia Stevenson of Citi.

“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.”

Chad Andree has over 18 years of workforce management experience in a variety of industries with extensive multi-site workforce experience and proven success in launching and redesigning workforce management and performance management processes, tools, and initiatives. Chad took on a new challenge at CenterPoint Energy in Houston, TX in 2010 with a focus on re-engineering the workforce management practices. As the Manager of WFM and Network Support, he manages Customer Service Workforce Management & Performance Management, a team of 14 people. They support four centers and over 550 agents handling calls and emails 24 X 7.

Chad is described as process-driven-passionate about workforce management and its impact on the success of the business. He has increased the efficiencies within the business by monetizing the payback of the improvements he proposed. Not only did Chad build a new

workforce management competency at CenterPoint Energy with real-time, forecasting, reporting, and planning capabilities, he was able to fund it with the efficiencies he gained through his improvement efforts. The workforce management operation is now first class and Chad willingly shares best practices with other utilities.

One of the specific accomplishments Chad completed includes a total reorganization of the workforce management team, with new job descriptions built around the workforce management processes. He hired for critical positions and reassigned the current staff based on their skill sets. New workforce management processes were developed and implemented along with regular WFM Systems and Communications Meetings. Chad initiated monthly workforce management review of performance, weekly net staffing meetings with the call floor management, and a workforce management call center new-hire presentation. Analysis is now supported by new reporting databases, KPIs/targets and scorecards including daily performance, intraday service level updates, director scorecards, agent scorecards, third party service level compliance, call center coaching logs and reports, more enabled ad-hoc reporting, and analysis capabilities. KPIs were developed for each level in the call center including agents, supervisors, managers, and directors. Standardized performance metric formulas, AUX/Idle Reason codes, and work-week definitions between North and South were also reconciled.

With all these changes, Chad was able to drive an improvement of 10% in service levels, with over \$1 million in saving year over year and was able to help the center come in at \$2.8 million below budget.

Robert (Bob) Dobson has been working for InterContinental Hotels Group (IHG) for 17 years and served as a resource planning and workforce management professional for 12 of those. He is now Director of Workforce Management, leading a team of 70 who support 2300 agents in 11 centers. The centers process phone, white mail, email, and chat interactions with the help of Avaya ACD with Best Service Routing and Genesys skill-based routing and workforce management.

Bob has the ability to think strategically and understand revenue, costs, and service level impacts on workforce management decisions. In addition, Bob learns quickly, continuously looks for improvements, challenges the status quo, understands root cause analysis, and how workforce management integrates with Operations teams and impacts employee engagement. This knowledge also allows him to provide actionable insights to the Operation teams to continue to improve the Guest Experience. Through Bob's leadership the workforce management team's Employee Engagement index has increased from 35% in 2009 to 65% by the end of 2011. In 2011 Bob led the workforce management team and IHG to accomplish many different projects and initiatives while reducing payroll costs by \$3 million and reducing cost per call from \$1.42 in 2009 to \$1.27 in 2011. Over the last three years, the team has faced budgetary constraints reducing overall agent variable payroll spend from \$25 million in 2009 to \$24 million in 2010, and to \$21 million in 2011. Throughout these three years, Bob has made strategic decisions around when and where to hire agents across the enterprise to balance revenue, costs, and service levels. All of this was done while changing the workforce management system to the current Genesys platform.

In 2011, Bob led a Call Center Management 101 – Back to the Basics workforce management initiative, providing clear financial accountability across the IHG call center organization. Specifically, he led an Accountable Shrink initiative enabling Operational and workforce management teams to work better together and accomplish 25 different project or training initiatives. These included an Accountable Shrink scorecard which provides the Operational Teams the prior week's performance broken down by code, and the next four weeks forecast. The forecast includes Agent Development hours and other Accountable shrink hours forecasted and actually booked in to the workforce management system. The scorecard provides critical insight for the Operations managers to know how their teams are working toward scheduling their accountable shrink activities two to four weeks prior to the week starting. The Agent Development forecast is critical to IHG's success ensuring that each schedule agent receives 60 minutes of Agent Development each week. This enables the workforce management team to prepare and understand the staffing levels for the coming four weeks and they are able to book additional time off for the agents when staffing levels

allow. The process also provides clear cancellation guidelines to both the workforce management and Operational teams based on business needs.

Michael Ellis of Suddenlink Communications has 13 years as a leader in workforce management, managing workforce operations domestically and offshore including the Philippines and Jamaica and for a variety of industries. As the Senior Manager of Workforce Operations, Michael leads a team of 10 supporting 1215 agents and 50 contractors in 7 centers handling phone, email and chat interactions.

When Michael joined the Suddenlink team in 2010, he was hired as the Workforce Manager for the Tyler, TX operations but has led the enterprise in moving to a centralized model in which his team does the forecasting, scheduling and adherence for the three other sites in Texas, West Virginia and North Carolina.

When a WFM Checkup report from The Call Center School revealed a lack of training in the workforce management team, Michael organized general theory and practice training as well as a week of direct training from Aspect on the eWFM tool. In addition, workforce best practices training was rolled out to a large number of supervisors, managers, and other staff within the Tyler center. Michael also made a presentation on “The Power of One” to demonstrate the importance of adherence and proper handle times. Those present were “stunned” to see how one individual’s performance affects service level and customer experience and Michael has now rolled out the training to all departments. Training has also been incorporated into the weekly staff planning meeting using “what-if” scenarios to show how changes in handle time or attrition affect the need for additional agents and the cost implications of these changes. For the first time, directors and managers understood the cost in salary and overtime when handle time is out of control and \$210,000 was trimmed from the 2012 budget through a commitment to lower AHT.

Working with the financial budgeting process, Michael has integrated the staffing capacity plan on a rolling 12-month basis and automated the process so that scenario changes can flow easily into the required budget worksheets. This not only reduces the workload in the annual

budgeting process but improves the accuracy as well. A close review of the third party vendor activities revealed opportunities for improvements and a \$150,000 billing error.

One major initiative Michael led was the development of a solution for several issues, including employee turnover, spikes in call volume and workload during the day, and difficulty recruiting employees for the technical support queue. Michael and a team of call center professionals began an on-the-job training partnership with a local college. The Tyler Junior College now has part-time students who are interviewed and trained on campus. The students are assigned flexible schedules that coincide with the peak call center volumes and particularly targets students with interest in or experience with Suddenlink products especially high speed internet. The first class of 16 began their training in January 2012 and successful students will have the opportunity to be hired full-time upon completion of their college coursework.

Kristin Goldman has been with Ameriprise Financial since 2000, but started her most recent role as a Capacity Analyst on the Workforce Planning & Analytics team in 2011. She has 12 years of experience in workforce management (WFM) including scheduling, real-time command center, capacity planning, and Aspect administration. Kristin's qualifications and experience make her a great fit for her position, which includes workforce planning related to training, flexible workforce, contingency, and staffing capacity for the company's Service Delivery organization. She is a member of a 24-person workforce management team supporting six call centers and over 750 agents.

Kristin's greatest strengths are her analytical skills and ability to streamline processes. She was instrumental in creating and streamlining several processes across the phone organization. These include consolidation of a number of sources of data for a new hire database, which now has a multi-user database and reports for Educational Services, Onboarding, Scheduling and Capacity Planning teams. Now all hiring, training, employee, and timeline information is available real-time from a single source.

Kristin is always looking for ways to remove manual processes and workload. One example cited addressed the case-handling process that was experiencing over 9500 cases that were

completed over-standard in 2010. The root causes of this included lack of clarity in the goals, validity of the case standards, limited reporting on case volume, production needs versus production capacity, and an inconsistent casework distribution system. Addressing each of these challenges in turn made the problems more readily solvable. The transparency and visibility into the over-standard case volume was enhanced by improved reporting. Kristin used this information along with the schedule and compliance information to build a comparative report. These enhanced reports are available to leaders on a weekly and monthly basis grouped by agent, case type, and department. By working to identify groups that had excess capacity and matching skills to the requirements, Kristin was able to place over 7900 hours of resources in 2011 and worked with the Case Queue manager to implement a consistent and efficient case distribution system. Kristin's collaboration across the Service Delivery Operations team has returned integrity to the case process time and production results, reducing over-standard case production in Enterprise Operations year-over-year by 98%, dropping from 9645 cases in 2010 to 186 in 2011.

Kristin also built a midterm goal perspective for the existing capacity plan so that it can be better utilized to align activities with goals and to provide leaders a more detailed translation of the capacity plan values to scheduling initiatives. She

Cynthia Stevenson has been involved in the workforce management operations at Citi for the last 14 of her 21 years there. As BP&A Senior Workforce Management Manager, she is part of a team of 400 workforce management staff supporting nearly 50,000 agents in 100 locations handling inbound, outbound, back office, email, chat, social media and branch interactions. In her role as manager over the systems administration team of eight, she leads the group in covering all of the workforce management systems and server requirements of virtual installations as well as other software and server installations for branch banking functions.

Cindy expanded the workforce management services globally for all customer service contacts in 2011. Cindy and her team were instrumental in bringing each country onto the workforce management platform, helping to identify opportunities for group consolidation,

providing tools in alternate languages, and training the agents. This project has achieved approximately \$700,000 in operational cost savings to date.

One significant project that Cindy took on was convincing the outbound operations that workforce management practices, policies, and processes could benefit their environment. This was not an easy sale but in 2010, a pilot project was initiated in one center handling outbound collections. The agents and managers were taught how to utilize eSchedule Planner, KPIs were discussed, and the management team was shown how to influence the results including use of the daily MIS package. Within one month of the pilot, significant improvement in availability was evident with an 8% increase in productivity. Over six months, that increased to 10%. As a result of this successful pilot, Cindy and her team were able to convincingly demonstrate how workforce management practices can directly influence outbound collections performance and allow more dedicated time for agents to actually interface with customers and deliver on expectations. Throughout 2011, all Citi collections groups were introduced to workforce management including approximately 3,000 additional agents. Full integration of workforce management into outbound collections has reached approximately 85% with cost savings of \$5.4 million in 2011 and growing.

Another important 2011 project was one dictated by new regulations that require Citi to offer customers a single point of contact for all pre-foreclosure collection efforts. Cindy and her team developed a strategy for customizing the workforce management tool and achieving the end goal that involves a call-back scheduling strategy. When a call arrives and the assigned agent is not available, the workforce management solution allows the active agent to schedule a call back, a meeting, or other interaction that will allow the customer's issue to be resolved by the agent on the account.

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 2012 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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