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**SWPP Announces Finalists for
2022 Workforce Management Professional of the Year Award**

NASHVILLE, TENNESSEE – March 28, 2022 – The Society of Workforce Planning Professionals (SWPP) has announced the five finalists for the 2022 Workforce Management Professional of the Year Award, which recognizes a workforce management professional who has shown outstanding leadership in the industry. The finalists are Kanchan Basu of Dish Network, Jeffrey Bretana of Navy Federal Credit Union, Jessie Cessna of Cigna, Steven Miles of TTEC, and Darrin Scholes of First Tech Federal Credit Union.

“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.” The winner of the award will be announced at the SWPP Annual Conference, which is held in Nashville, Tennessee on April 4–6, 2022.

Kanchan Basu is Head of Customer Experience Organization, Workforce Management for DISH Network, which employs 7,000-9,000 agents globally. DISH uses Calabrio, Cisco Chat, ASAPP Social Media, and Sprinklr. Kanchan started his career as an agent and then moved into WFM at an IT services company, where he went from using spreadsheets to a WFM tool. A move to large telecommunications provider gave him even more WFM insights.

After moving from India to the U.S. in 2008, Kanchan became a workforce manager for DISH, quickly rising through the ranks to his current role as Head of the Workforce

Management Customer Experience Organization for the company's wireless brands. But when he started at DISH, WFM was in its infancy. Beyond bidding for shifts — which could be done but took 8-9 months to complete — agents enjoyed little workplace flexibility.

Under Kanchan's guidance, the WFM function at DISH has evolved into a critical function that underpins the company's aggressive corporate growth goals. It's his job to make sure all the brands under DISH's umbrella maintain modern contact center forecasting systems, scheduling systems, and capacity planning systems, so they can deliver no matter what comes their way.

Kanchan credits his prevailing WFM success to two key elements: understanding what motivates contact center agents and what motivates vendors. Kanchan notes, "I know that when it comes to scheduling, work-life balance has always been one of an agent's top priorities — the pandemic simply gave it more prominence and publicity. So, as a WFM leader, one of my priorities has always been to investigate and implement the kind of next-generation flexibility that can give agents what they want most when it comes to scheduling." "And I've been on the other side of the table as a vendor," Kanchan says. "Now that I'm a client, I can leverage what I learned about what motivates vendors to build strong, mutually beneficial relationships with them. Everybody wins."

"For example," Kanchan continues, "in 2016, when it was time for our DISH contact center operations to upgrade to a more powerful WFM platform, we knew it was going to be a decision that would impact our daily operations in a big way, so making the right choice was absolutely critical. I came up with a proof-of-concept plan where we gave each vendor under consideration a standard week from past contact center operations — forecasts and schedules — and had each vendor predict our service levels based on that information. Then we compared their predictions to what actually happened and signed a contract with the vendor that was most accurate. That's how we made sure we could get exactly what we needed in our new WFM platform."

When Kanchan first launched preference-based scheduling to DISH contact center agents, some agents were given a schedule where different days of the same week had different start times. And that didn't work well at all. Kanchan knew DISH's contact center needed to find a better way to use preference-based scheduling — one that preserved its key functionalities while improving the agent experience. "We knew our forecast doesn't swing that much from week to week," Kanchan explains. "So we optimized our preference-based scheduling for one week and made sure each agent had consistent daily start times for each day of that week. Then we copied that schedule out for the rest of the quarter. With this new strategy, we could still meet our call-arrival patterns, but we could also give our team a better agent experience with the same schedules over the quarter. And, if they performed better during that time, they could get better schedules for themselves next quarter." Significant gains were observed in attrition, schedule adherence and employee engagement.

"It's never been more important to find more ways to give agents every possible opportunity to get better schedules, so they can enjoy lives that have less stress," Kanchan says. "That's why we're always reviewing and recalibrating our scheduling, trying to make sure we look at everything and build upon what's been successful."

Jessie Cessna is Resource Planning Director for Cigna insurance with over 4000 agents using Genesys Decisions, IEX, Intradem, Cisco, and Verint Quality. She is highly organized and has a process improvement background, along with a communication degree that has provided a very effective communication path with the operation. She holds a Green Belt in Six Sigma, and describes herself as a utility player. She has led all different types of WFM functions, including Capacity Planning, Demand Forecasting, Scheduling and Real-Time Management so she has a well-rounded approach to workforce planning.

Jessie has been in WFM for 18 Years including 10 years at JP Morgan Chase working in various roles. She has been with Cigna for two years, supporting 4,200 FTE in a global setting that handle over 36 million contacts annually. She leads a team of 23 analysts that handle scheduling, forecasting and planning in WFM and she has implemented both Quality and WFM tools. She was originally brought onto Cigna in a Principal role to facilitate process improvement and serve as Chief of Staff for the Managing Director. She quickly received the opportunity (after less than four months at Cigna) to take on the Planning Team.

Since coming to Cigna, Jessie has been instrumental in driving value-add changes into the workforce planning process as well has supporting the implementation of workforce planning at the enterprise level. Using her extensive knowledge while focusing on building a highly-skilled team has enabled her to drive efficiencies and new methodologies that have contributed to significant savings to the organization.

Jessie developed an end-to-end process for tracking initiatives impacting forecasting and capacity planning models. This process was designed to prevent overlapping benefits, prioritize scheduling of initiatives, and highlight the changes to forecast assumptions (i.e., Average Handle Time (AHT), Demand, Shrinkage, etc.). The result of this process enabled Jessie and her team to accurately assess the impact of multiple layered initiatives to capacity and performance and contributed to an operational savings of \$21M.

Jessie's team also includes a group focused on Data and Insights, where they have been able to develop visualization to help the business be more informed on their year-over-year and month-over-month KPIs, along with Full-Time Equivalent (FTE) waterfalls (traditionally created in Excel) now created in Tableau. Now they have the ability to see these waterfall charts that show information in 47 different cuts with a click of a button.

Jessie has had many other accomplishments throughout her tenure with Cigna, including:

- Creating a new data & visualization tool that provided better business intelligence while reducing overall planning time by 40 hours.
- Implementing new forecast models and methodologies resulting in a 9% improvement in forecast accuracy equating to \$500,000 in savings.
- Maintaining a 3-5% forecast variance throughout the pandemic.
- Developing an Average Speed of Answer (ASA) modeling tool, that was leveraged for the first time during the 2022 peak season. This tool increased the precision of the interval level ASA forecast and reduced the processing time for this information from two days to a matter of minutes.
- Enabling better decision-making for hiring, staffing, and scheduling.
- Setting clear expectations on performance for all levels of the organization.
- Increasing automation within the planning process resulting in \$50,000 of time savings.

Jessie describes herself as a servant leader, most importantly creating a culture of trust. She builds high-performing, engaged teams and she is always looking after the welfare of her team and how it will help the greater good.

Jeffrey Bretana is the Assistant Manager, Workforce Management, Collections Workforce Optimization for Navy Federal Credit Union where he has served as a WFM analyst for over 14 years. Jeff brings a wealth of experience to his role, having served as an analyst in Workforce Management for 14 years. He began his career in Navy Federal's main contact center, moved to WFM for Branch Operations, and two and a half years ago he transitioned to the Collections Workforce Optimization team. He is an SWPP Board Member and active speaker, helping to share best practices with his peers in the WFM space.

Navy Federal had been using Verint's Workforce Engagement solutions since 2012. Jeff spearheaded the effort to expand use of the solution further into the Collections team in 2019. While the initial objective was to improve operational performance, once the

pandemic hit, it was a critical element in the effort to transition the Collections department's 1,000 agents to working from home. Navy Federal also needed to maintain a high level of member service during uncertain times as inbound call volumes doubled and tripled.

Jeff led a dramatic rethinking of the recipe for success in Collections. The pervasive thinking was to allocate resources to cover a total of 10,000 calls to engage with members with delinquent accounts. However, the team realized that these efforts had a significant cost to the organization both in overtime and even burnout for staff.

Navy Federal used Verint Speech Analytics to determine the top requests that were coming from members. Early in the pandemic, there was an increased number of payment extensions requested and approved. Through analysis from the speech technology, the team was able to apply the 80/20 rule, and the 20% of accounts deemed least likely to result in collection were eliminated from agent call lists. This enabled agents to focus on the resulting 80% of accounts they were most likely to collect from.

Within the first year, automation alone saved the Collection team more than 5,000 work hours and optimized nearly 1,000 agent shifts and breaks. This helped to reduce the call abandon rate from 3.3% to 2.4%, a most critical metric as inbound calls nearly always result in a member making a payment or establishing a payment plan.

The new thinking and operating plan that rightsized Collection call efforts saved the company even more. Navy Federal was able to improve outcomes significantly, collecting \$23.9 per attempt increased to \$29.2 per attempt. Even though they made 100,000 fewer calls in January 2022 compared to January 2021, they collected approximately \$3.5M in additional revenue. Based on how many calls an agent makes/takes per month, this is approximately a 25 FTE savings.

Navy Federal tracks metrics on Right Party Connect Rate, Promise to Pay, and Payment Collected, all valuable to the organization. Right Party Connect basically indicates success when dialing, rather than voicemail, wrong person, wrong number, etc., and indicates success in connecting with the intended person. A Promise to Pay is essentially like a payment arrangement where Navy Federal works out a plan to get the account out of a late status, only achieved when connected to the right party. And, of course, calls resulting in payments collected are considered the highest value call. The organization has increased Right Party Connect from 3% to 4%, Promise to Pay from 1.8% to 2.2%, all while having delinquent accounts increase by 660,000. Essentially, even though the Collections department is getting busier, agent efficiency is increasing in parallel.

Key to bringing about winning, agile, and empathetic contact center operations has been Jeff's leadership and team-building skills. Upon taking the reins in the Collections group, he set up to instill a partnership atmosphere. He's also sought out team members that have a curious mind and created a work environment where experimentation is encouraged. He is not intimidated by people being honest with their feedback. "I'm not always the subject matter expert and I work to instill a culture of trust and empowerment among my colleagues," said Bretana.

Steven Miles is Executive Director Global Workforce Management for TTEC, a BPO with 65,000 agents in 80+ locations which utilizes technologies from Aspect, Verint, IEX, ASTT, Cisco, Humanify, AWS, and Avaya. Steve has been in the workforce management field since 1995. His career has spanned MCI/WorldCom, Gateway, and TTEC. He has worked his way from a frontline associate to the level of Executive Director of Workforce Management.

Steve supports the entire WFM team of over 650 associates at TTEC by leading the administrative team that manages all WFM Tools and reporting systems, onboarding guides who manage the agent onboarding process from "roster lock" to "go-live," and managing

the managed service (outsourced WFM) teams for a portfolio of clients, as well as other day-to-day functions related to WFM lifecycle activities.

Steve is first and foremost a communicator who seeks to understand, then connect, both relationally and directly to those whom he supports. Steve brings an analytical mind and decades of experience with a keen curiosity to the WFM workspace. His role is that of a WFM practitioner and administrator, brand ambassador, and consultant. He leads from a place of understanding and empathy. He knows what is needed not just from listening, but also from seeing all sides of an issue.

In 2020, TTEC – like all organizations – faced the critical issues of staffing on demand, while moving and shifting resources from brick and mortar to home. In this period, the organization also had to ramp up new hire classes and convert capacity plans, all while surging with a record number of clients and agents moving into new environments. This exposed a need to innovate a streamlined approach to staffing and planning that would better integrate Talent Acquisition, Capacity Planning, Asset Management, Quality Assurance, and coordination of ID management and accesses.

Steve stepped in and facilitated a process at an enterprise level with a new system for managing the inventory of classes, available agents, training resources, talent pipeline, and technology assets. This system was also accompanied by a new team piloted in 2020 and evolved in 2021 called onboarding guides who are under the scope of WFM. Together the new system and the onboarding guides shepherd from the capacity plan to “go live” for each class across all lines of business, which in a peak quarter can be upwards of 25,000 agents across multiple international geographies spanning North America, APAC, Europe/North Africa, The Middle East, and Latin America. Together, improvements in onboarding time, shrinkage, and efficiency have netted 15% more headcount, closing the target to capacity, and improving class-fill metrics across all lines, while allowing for greater flexibility to realign agents. The increased agility allows for ramp-ups of 200 or more agents

in some cases in as little as three weeks from class creation in the system to training start. This is due to the integration to IT/talent acquisition/Staff Planning/Training and all stakeholder business units. In addition, Steve's team created and implemented training for the enterprise that educated everyone on why the tool was needed, how it was used, and how it would help, all while giving more insight to capacity planning in general in the context of "The Power of One" on day one.

The implementation of this system has moved WFM from a consultancy role to the business driver and decider of when things are needed and where. The system allows greater cost control, more efficient class starts, and a streamlined overall process, complete with humans to guide the entire onboarding process. In short, this tool has allowed us to improve onboarding time achievement by 46% with an increased class input & fill output rates by 15%.

Darrin Scholes is Senior Manager, WFM for First Tech Federal Credit Union with 113 agents utilizing PEGA, PureConnect (moving to Calabrio), and Nuance IVR. Darrin has nearly 20 years of experience working in WFM, and has successfully implemented, from scratch, two WFM systems at two different companies.

Darrin is an expert at explaining the reason for WFM to all levels of leadership and employees. His ability to illustrate the "why" behind WFM in layman's terms to "non-contact center" individuals has become paramount in his success.

Darrin started at First Tech in March of 2021 and immediately set out to improve the operations. The operations were consistently showing a high level of abandonment of members, with low service levels and resulting low Net Promoter Scores (NPS) that suffered from long wait times for members.

When Darrin arrived, First Tech was consistently performing 40% or below for Service Level, where the goal is 80% of calls answered in 60 seconds or less. The company was spending approximately \$100K per month in vendor support and upwards of 20% of calls were being abandoned.

Once Darrin understood the current process, he dove into the system functionality. Darrin worked with vendor partners to set up training for the staff, himself, and others that utilized the system to ensure they had sufficient knowledge to manage the system and the contact center. Next, Darrin set out to develop an accurate forecast and optimization of break and lunch schedules to ensure that they had our agents in the “Right Place at the Right Time.” Without adding additional agents on the phone, Darrin was able to significantly increase the Service Level of the contact center from 40% to 75% in just one month.

The next steps were to help the contact center leadership to control shrinkage, develop rigor with schedule adherence, and create an overall strategy that allowed for consistent repeatable performance. Here are some of Darrin’s accomplishments:

- Shifted First Tech culture to move to all pre-planned activities. This was accomplished by adding consistent team meetings and training time on agent schedules to reduce the need for pulling agents off the phone without planning ahead of time.
- Standardized the use of AUX codes to reduce variability and understand gaps in agent performance better.
- Developed shrinkage models, reports and dashboards that enable leaders to better understand the impacts of their decisions.
- Worked with leadership to illustrate how schedule adherence drives service level and created clear reporting on the impacts of adherence that allowed leaders to coach their agents with much more clarity.

- Created a structure within WFM that has enabled the First Tech contact center to achieve 70% service level ratings or higher since June of 2021 and achieve 83% service level in the final quarter in 2021. This was achieved by the great partnership that he has developed with all the leaders in the contact center, plus having a consistent process that he has trained his team to provide.

Darrin's procedures helped to facilitate these improvements:

- Reduction in handle time from 11 minutes to almost 8 minutes.
- Vendor overflow savings of \$50K per month.
- NPS increase of 10%.
- Member abandonment rate dropped from 16% to 2%.
- Increased sales performance.
- Increased employee and leadership engagement.
- More refresher and ad hoc trainings provided by Training than previously has been possible due to service level increases.

Lastly, the most impactful of all these has been Darrin's ability to inspire trust in the process, educate his team and collaborate with all of leadership to ensure everyone understands and agrees with the process going forward. "It has been a pleasure working with Darrin and he has transformed our operations for the better and we are lucky to have him on our team," according to Donald Wynant, Director of CSC Operations.

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 2022 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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