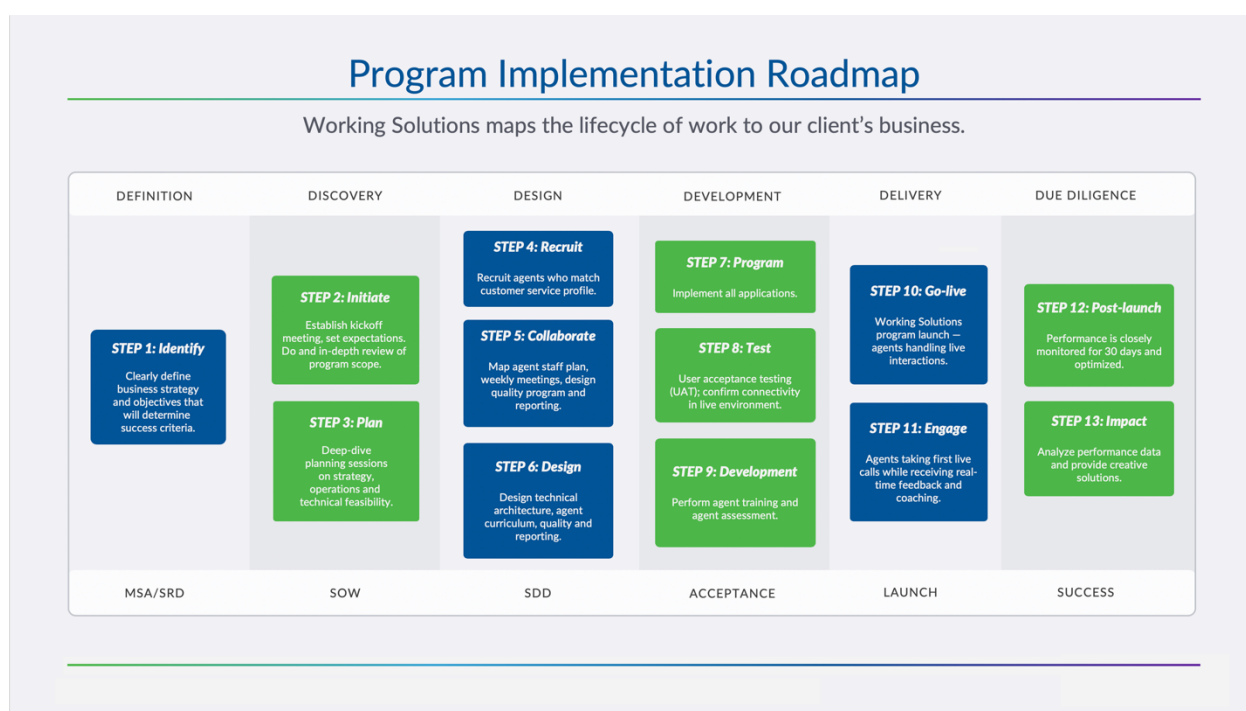# 7.10 ACCOUNT MANAGEMENT

Describe the account management process that would be utilized for this business

Once we have met with all the key stakeholders at Zillow, we will assess needs and requirements to determine the best cultural fit when selecting an account management team. Many of our program managers offer more than 20 years of experience in the call center space. They bring proven track records to coordinate and implement processes end-to-end with continuous improvement. They can lead and handle multiple, time-sensitive projects.

Our account management process focuses on results and leveraging quantitative analysis to guide data-driven decision-making. Program managers take pride in consulting and are flexible with change in a fast-paced environment. They bring years of strategic planning, implementation and execution experience to ensure a smooth launch and healthy partnership. Based on client needs, weekly and quarterly business reviews and implementation plans are conducted. These managers possess strong communication skills with the demonstrated ability to deliver across channels. Ultimately, our team strives to wow clients, please their customers and be the best of the best on all levels.

Program Implementation Roadmap

Working Solutions maps the lifecycle of work to our client's business.

DEFINITION	DISCOVERY	DESIGN	DEVELOPMENT	DELIVERY	DUE DILIGENCE
STEP 1: Identify — Clearly define business strategy and objectives that will determine success criteria.	**STEP 2: Initiate** — Establish kickoff meeting, set expectations. Do and in-depth review of program scope. **STEP 3: Plan** — Deep-dive planning sessions on strategy, operations and technical feasibility.	**STEP 4: Recruit** — Recruit agents who match customer service profile. **STEP 5: Collaborate** — Map agent staff plan, weekly meetings, design quality program and reporting. **STEP 6: Design** — Design technical architecture, agent curriculum, quality and reporting.	**STEP 7: Program** — Implement all applications. **STEP 8: Test** — User acceptance testing (UAT); confirm connectivity in live environment. **STEP 9: Development** — Perform agent training and agent assessment.	**STEP 10: Go-live** — Working Solutions program launch — agents handling live interactions. **STEP 11: Engage** — Agents taking first live calls while receiving real-time feedback and coaching.	**STEP 12: Post-launch** — Performance is closely monitored for 30 days and optimized. **STEP 13: Impact** — Analyze performance data and provide creative solutions.
MSA/SRD	SOW	SDD	ACCEPTANCE	LAUNCH	SUCCESS

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Do you have an account manager in mind that would be a good fit for this business? Can you provide a brief bio on this person?

With additional discussion, we can provide a better match to Zillow's needs and culture. We do not have a specific manager selected at this point for your program. That said, we would lean toward one of our leaders with the following backgrounds.

Jeff Innis, Program Success Manager

Jeff has 18 years of experience in the outsourced contact center industry. His experience includes inbound, outbound, chat and email support for clients in diverse businesses. They range from pharmaceutical to healthcare to technology. *Read more >*

Marselles Goggans, Program Success Manager

Marselles is a highly analytical, action-oriented and results-focused program/project manager. He has five years of project experience (technology and operations) in the public and private sectors. He specializes in implementation and deployment. *Read more >*

Tera Rogers, Director Program Success

Tera is well-versed in global project management in the outsourcing industry. She has a proven track record in coordinating and implementing end-to-end processes with continuous improvement. *Read more >*

Andrew Nagg, Director Program Success

Andrew is a customer care and contact center operations leader. In this role, he leverages more than 17 years of industry experience and expertise. *Read more >*

Do you allow and provide space for Client to have on-site temporary visits?

Working Solutions is a virtual, on-demand service provider. All of our agents, who are independent contractors, work from home. As such, we do not have a traditional, brick-and-mortar call center for client visits.

We can, however, arrange for the Zillow team to listen in to agent education sessions, follow agent/customer interactions and explore the agent website, Vyne, to understand its use for your program's success.

WORKING SOLUTIONS

Below is a snapshot of Vyne, covering key features.
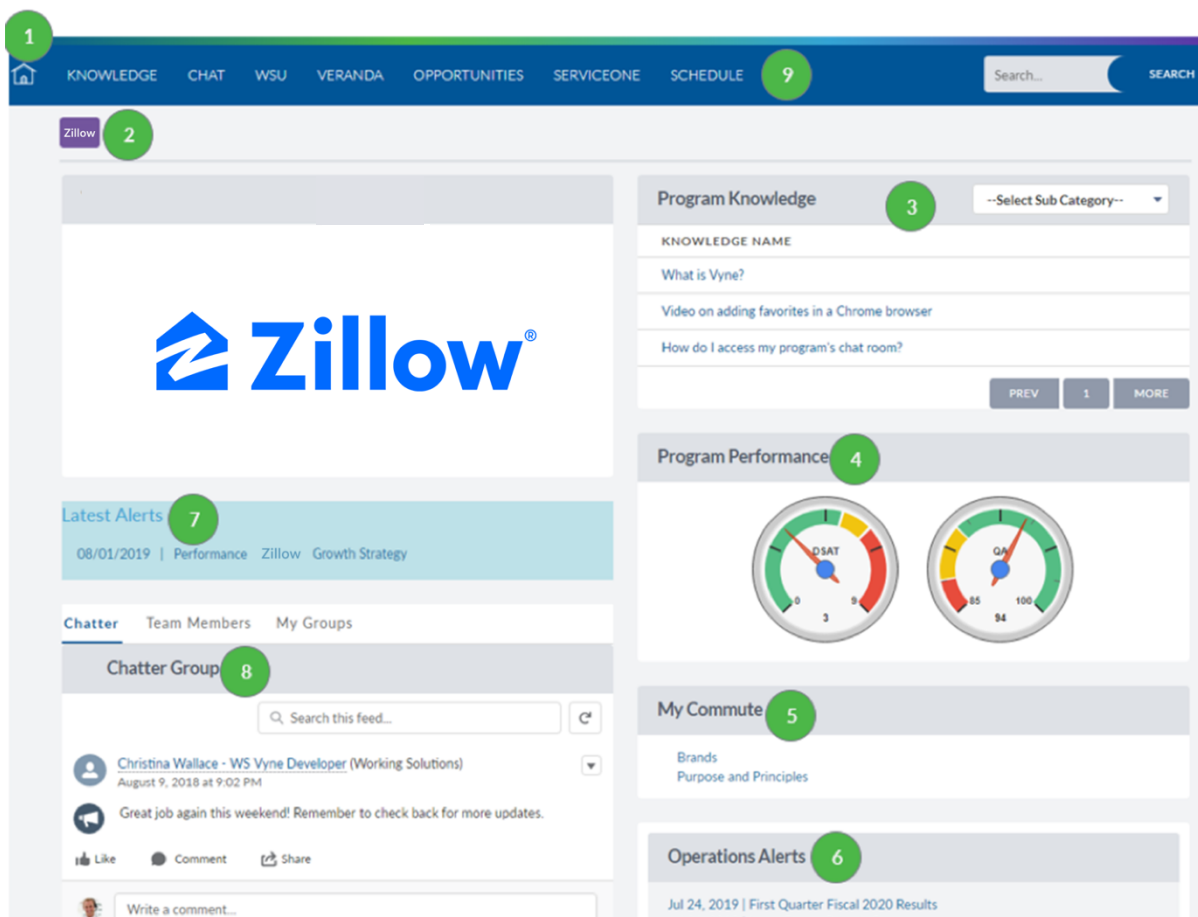
1. **Main Homepage** – This is the first page an agent sees at every login. Here, we post company-wide announcements and videos of related news. On the right, agents access their schedules at a glance and any recent messages they need to view.

2. **Zillow Icon** – The icon on the top left shows a Zillow button that is purple. Once logged into Vyne, an agent on Zillow program will click on that button to go into the specific page. Only active agents on your program will have access to the page you see in the picture above. Above is the main page for the Zillow program.

3. **Program Knowledge** – Top right: This section is used as a knowledge base or quick reference guide for the agents if they ever have questions, they need answered real time. An agent can sort by category to narrow results, if on the phone with a customer.

4. Program Performance – Right Side: These dials are customizable. They give agents a visual on how they are performing on specific key performance indicators (KPIs) every time they log in for work, so they know what they may need to improve on.

5. My Commute – Even though agents work at home, they still have to log in to multiple systems to properly perform the job. This section ensures they are always logged in to any application or system needed and will list all applications here.

6. Operations Alerts – Urgent and critical information can be posted in this section to update agents on any items that may affect their work.

7. Performance Alerts – Agents will be made aware of critical information from Zillow. This is also displayed under the operations alerts (#6) when you are logged into Vyne.

8. Chatter Group – Management and agents can talk with each other to keep agent engagement high. Questions can be posted here, as well if the agent is not able to find an answer in the program knowledge section.

9. Top Navigation Bar – This chat for entire agent community. Working Solutions University (WSU) takes the agent to our online training portal.

Veranda is an online water cooler where top agents are recognized.

Opportunities is other programs hiring additional agents.

ServiceOne is internal tech support for our agent community. We will attempt to troubleshoot any issues our agents may encounter with the Genesys platform or with Zillow's internal systems.

Schedule is where agents can plan when they will be working. We drop a schedule and allow agents to pick their own hours. If agents are exceeding all KPIs, we give them VIP scheduling. This offers them 24-hour priority to schedule their hours, which is a great motivator to exceed on all KPIs.