September 4, 2019

RAFAEL A. HERNANDEZ

Sr. Manager, Workforce & Vendor Operations

Zillow Group
rafaelh@zillowgroup.com

Dear Rafael,

Ours is an ever-changing business world. Expectations, fueled by technology, continue to climb. To succeed, customer service must not only rise with it—but stay ahead of it. No small task.

Quality service requires customer care that's fluid and flexible. All at once. Everywhere for everyone. Every time. Nothing demands more personalized service than the real estate and rental marketplace. The business that Zillow is in—helping people find places that they'll love.

Just as Zillow reimagined your industry, so too has Working Solutions redefined what customer service should be. Making it friendlier, easier and much more responsive. High tech and high touch.

Kim Houlne, our founder and chief executive, built the business based on a caring culture, where employees and contact center agents identify with the people they serve. We recruit professionals whose passion for great customer care is embodied in the brands they represent.

In business for 23 years, our company, a forerunner in the remote workforce movement, continues to evolve—just as Zillow has done since 2006, serving "the full lifecycle of owning and living in a home."

In your proposal, you seek to expand your contact center operations, reaching out to more people. For workforce management, your needs match the Working Solutions business model. Delivered in 15-minute increments, it adjusts to market cycles and evolving consumer needs.

Backed by an onshore network of 110,000+ contact center agents across the United States and Canada, our fast-flex solutions will serve your everyday needs, handle seasonal spikes and be ready for long-range projects. We will move with your business, whatever the direction.
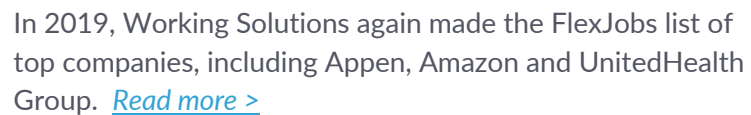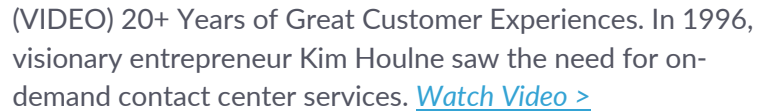
Working Solutions strives to make our clients heroes in their industries with superb sales and service. For Zillow, we will create an on-demand workforce in your own image. Our agents will immerse themselves in your business to serve current customers and new ones as well.

We welcome the opportunity to earn your business. Thank you for considering us.

Sincerely,

TROY HESSELGESSER

WORKING
SOLUTIONS

7.3 VENDOR INFORMATION

Name: Working Solutions is a recognized leader in on-demand, onshore contact center outsourcing. The company has placed in the FlexJobs Top 100 Companies for Remote Jobs for the past five years—the last four in the Top 10.

(VIDEO) 20+ Years of Great Customer Experiences. In 1996, visionary entrepreneur Kim Houlne saw the need for on-demand contact center services. *Watch Video >*

In 2019, Working Solutions again made the FlexJobs list of top companies, including Appen, Amazon and UnitedHealth Group. *Read more >*

Address: Working Solutions is located at 19111 Dallas Pkwy #180, Dallas, Texas 75287.

Primary Contact: Troy Hesselgesser: senior vice president for Business Development (972) 964-4800 (X 222) / (949) 355-3646 /*thesselgesser@workingsol.com.*

Phone Number: Main office, (972) 964-4800.

Website:

Business-to-business site –
workingsolutions.com.

Agent/jobsite –
*jobs.workingsolutions.com.*

WORKING SOLUTIONS

Years in Business: Led by founder and chief executive Kim Houlne, Working Solutions is a woman-owned company, headquartered in Dallas, Texas. Over the past 23 years, we've had 100+ clients across diverse industries—including consumer services, healthcare, retail, and travel and hospitality.

We serve FORTUNE 500 companies, as well as mid-sized businesses. Clients see value in our proven, distributed-workforce model. A number of them have been with us for years, including A Place for Mom, Egencia and StubHub. Other clients will work with us, conclude their programs—and later return for repeat business, such as McKesson and Intuit.

The number of clients varies annually, depending on business cycles and selling seasons. By in large, most of our business comes to us through client referrals and successes.

Site Location(s): As a fast-flex customer service operation, Working Solutions does not have traditional, brick-and-mortar call centers, which are limited by geography. Instead, our remote agents are part of distributed workforce, operating with great flexibility through a virtual network 110,000+ strong that spans the United States and Canada.

Engaged Agent Density by State and Province
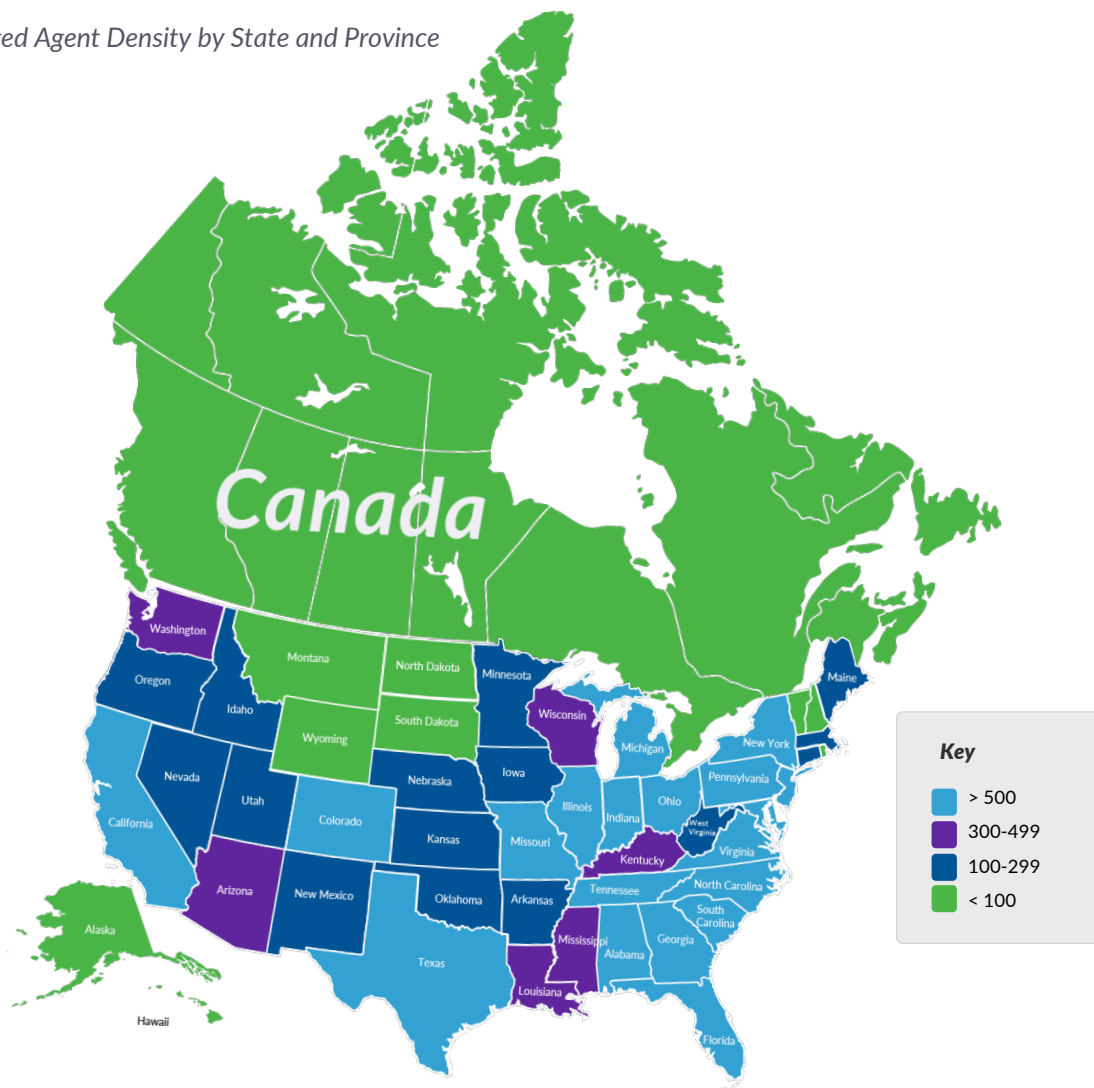
Number of Employees: As a virtual company, we practice what we preach. We have 150 employees, with 80% of them officing offsite and the rest working at the Dallas corporate headquarters. Remote workers include executives from our senior management team. All of our contact center agents are independent contractors (1099)—customer service professionals working from home throughout the United States and Canada.
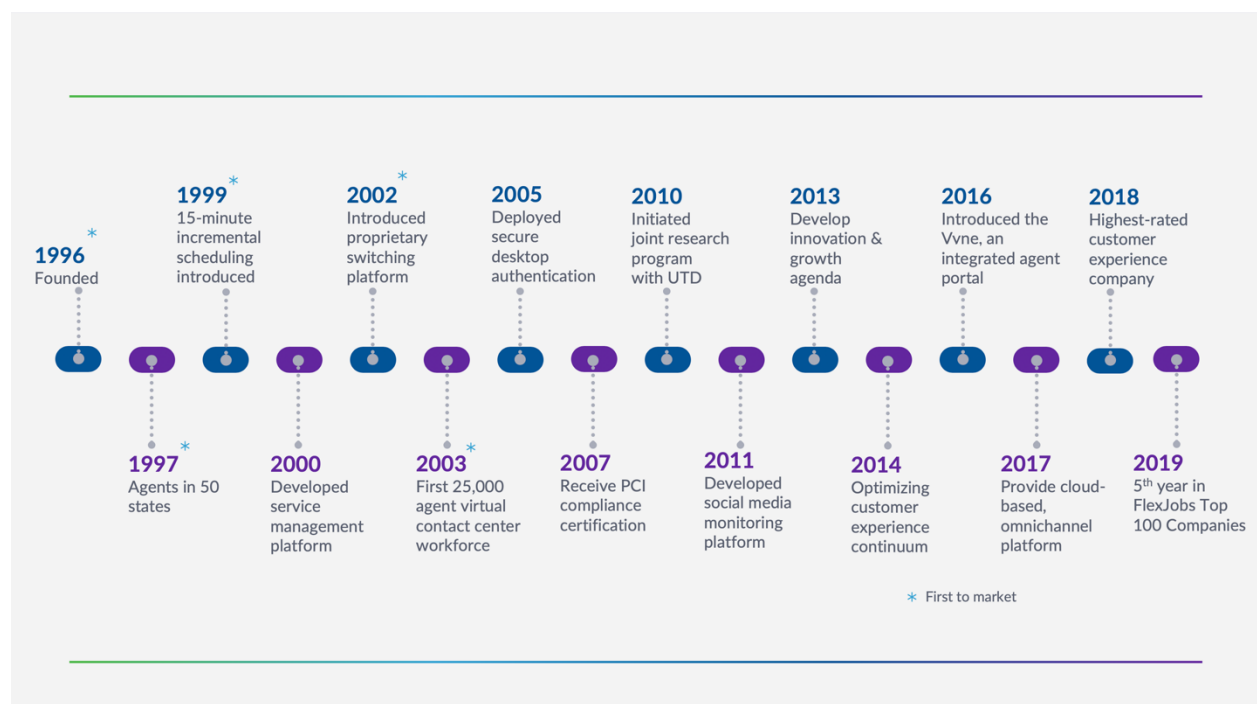
7.4 COMPANY HISTORY

Please provide general information on the company history and brief biographies on key personnel and employees who will be involved with our business.

In 1996, Working Solutions pioneered on-demand, onshore contact center outsourcing in the United States. The company, in fact, went "gig" a couple of years before Google was even founded. Started by entrepreneur Kim Houlne, Working Solutions' innovation has led the contact center industry, using an entire workforce of home-based customer sales and service agents.

As chief executive today, Kim points to the company's first project handling inbound and outbound calls for a city government. To recruit agents for the job, she launched a website at a time when the internet was in its infancy—becoming one of the first virtual workforce companies.

By the end of the first year, the Working Solutions agent network grew to 2,000. Today, more than two million people have applied. Our network now includes more than 110,000 registered agents in the U.S. and Canada. Clients have access to a pool of educated professionals from virtually any industry, geographic location and experience level. The company's new headquarters are located in Dallas, Texas.

Our market leadership and industry milestones continue to chronicle proven staying power in serving clients and their customers. Here are highlights:

1996 Founded *

1997 Agents in 50 states *

1999 * 15-minute incremental scheduling introduced

2000 Developed service management platform

2002 * Introduced proprietary switching platform

2003 * First 25,000 agent virtual contact center workforce

2005 Deployed secure desktop authentication

2007 Receive PCI compliance certification

2010 Initiated joint research program with UTD

2011 Developed social media monitoring platform

2013 Develop innovation & growth agenda

2014 Optimizing customer experience continuum

2016 Introduced the Vvne, an integrated agent portal

2017 Provide cloud-based, omnichannel platform

2018 Highest-rated customer experience company

2019 5th year in FlexJobs Top 100 Companies

* First to market

WORKING SOLUTIONS

Leadership Team

Our senior management includes:

Kim Houlne, President and Chief Executive

Kim founded Working Solutions in 1996. The Dallas Business Journal recognized her as an outstanding North Texas businesswoman. Chase spotlighted Kim's entrepreneurial leadership. *Read more >*

Gail Rigler, Chief Marketing Officer

Gail has 30 years of experience, with deep expertise in marketing strategy, planning and execution. She served as CMO for EDS, a $21B technology services company, overseeing worldwide marketing and communications. *Read more >*

Troy Hesselgesser, Senior Vice President of Business Development

Troy has directed brand-building and managed relationships with FORTUNE 1000 companies. His experience includes developing a direct sales model for high-profile enterprises. *Read more >*

Ashok Narayanan, Strategic Technology Officer

Ashok likes to get under the hood to engineer client solutions that elevate customer service. He creates software and platform engineering, development and delivery to advance the business. *Read more >*

Kristin Skiko, Vice President, Talent Management

Kristin has 20 years of human resource leadership experience. Her career includes several recruitment and HR positions with Mutual of Omaha. *Read more >*

WORKING SOLUTIONS

Tamara Schroer, Vice President, Education and Development

Tamara brings 20+ years of virtual agent experience, with a degree in education. She developed teaching methodologies for the virtual classroom that are now used industrywide. *Read more >*

Tracey Sloan, Vice President of Innovative Solutions and Support

Tracey is an expert in virtual contact center operations. She has run or consulted on delivering 85 client programs—ranging from inbound and outbound work, technical support, program retention, sales and market research. *Read more >*

Billy West, Vice President, Information Technology

Billy has 30+ years of experience as an IT telecommunications leader. Before joining Working Solutions, he ran management information systems at ConferenceCall.com (now West Corp.), responsible for all voice and data systems. *Read more >*

Cathy Metry, Vice President of Finance and Controller

Cathy first began her association with Working Solutions as an outside consultant. That outside-in perspective gives her a unique vantage point, always with a consultant's point of view. *Read more >*
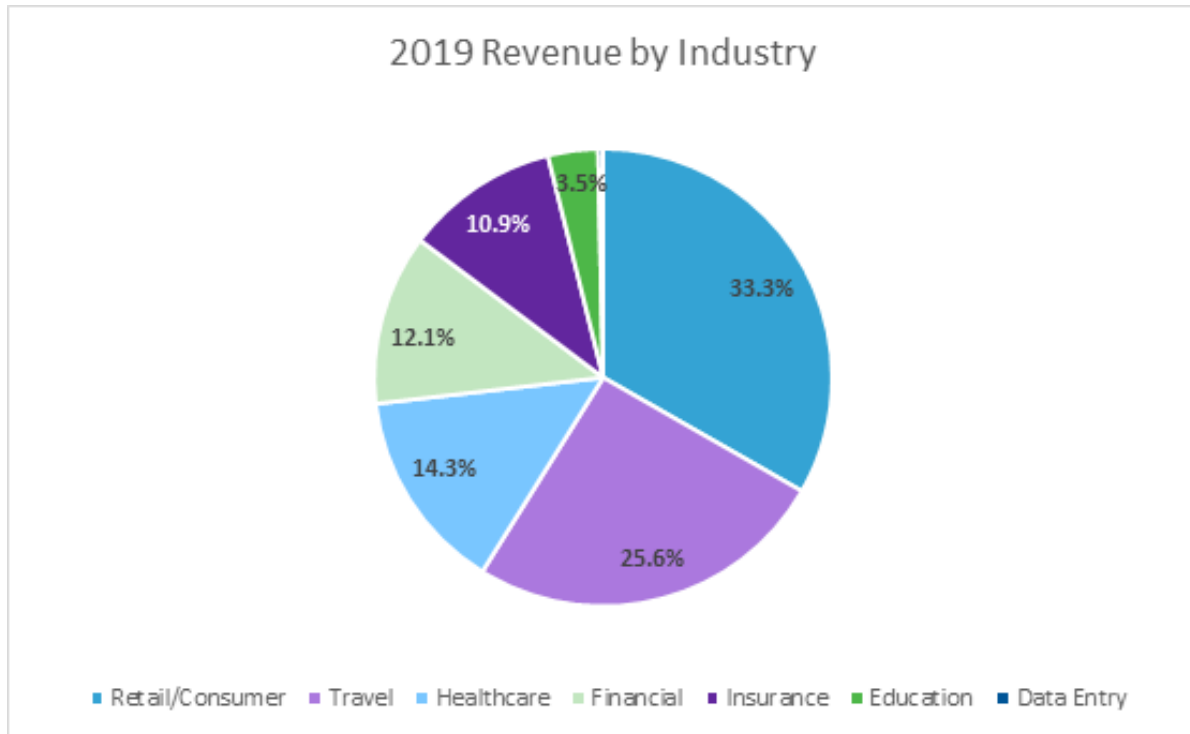
April Wiita, Vice President of Program Success

April ensures ever-ready, up-and-running customer service for clients. An expert in mobilizing remote agents, she has directed on-demand workforces in the face of hurricanes Sandy, Matthew and Michael. *Read more >*

WORKING SOLUTIONS

Top 3 industry specializations and percent of business for each.

Here's a look at our revenue by industry this year:

2019 Revenue by Industry

- Retail/Consumer — 33.3%
- Travel — 25.6%
- Healthcare — 14.3%
- Financial — 12.1%
- Insurance — 10.9%
- Education — 3.5%
- Data Entry

Top 3 services provided and percent of business for each.

Customer Care – 54%
Consultative Sales – 31%
Tech-and-user Support – 15%

WORKING
SOLUTIONS

Organization chart
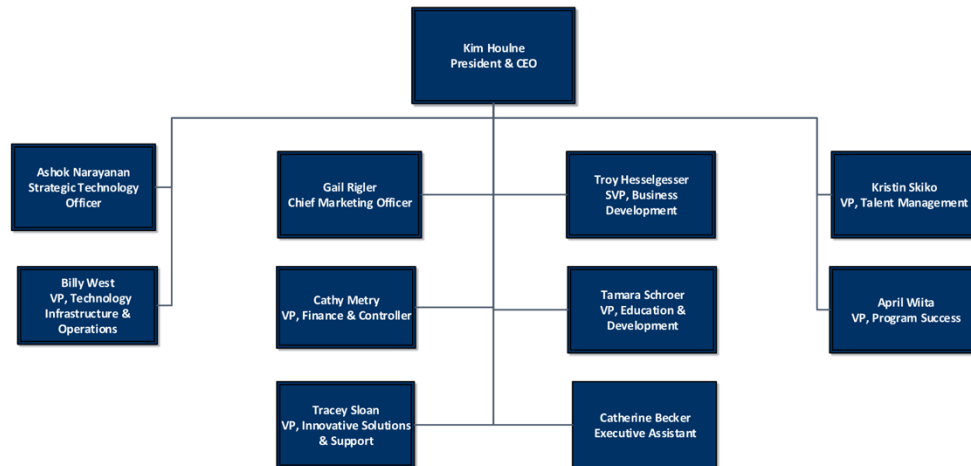
Describe general company culture

Since the beginning, chief executive Kim Houlne has fostered a caring workplace. She created a culture of great customer service, based on trustworthiness, reliability and responsiveness.

Kim believes the way employees and agents are treated, with respect and dignity, is reflected back in how they engage with clients and their customers. Give and get is her philosophy. That's why Kim travels the country throughout the year, meeting face-to-face with agents to encourage them, learn from them, and ultimately, elevate the service delivered by them.

WORKING SOLUTIONS

To learn more about Kim's approach to people and business, please visit *kimhoulne.com*.

To better appreciate her entrepreneurial spirit and work ethic that infuses the company, read the blog: *The 32nd Flavor: Sweet Success*.

And to understand the *power and potential of on-demand contact center outsourcing and our agents*, check out Kim's recent interview in *Contact Center Pipeline*.

What languages do you have capabilities?

At one time or another, we've supported more than 30 languages to engage our clients' customers. The most prevalent languages our clients need today are English, Spanish and French-Canadian.

Revenue for the last 3 years.

With 20+ years of success, Working Solutions is a recognized leader in onshore, on-demand contact center solutions. Its remote workforce includes sales, customer care and technical experts—with 110,000+ registered agents in the United States and Canada. We deliver fast-flex business process outsourcing (BPO) services for clients and their customers across diverse industries, such as consumer services, healthcare, retail, travel and hospitality.

Working Solutions has been privately held since 1996 and therefore does not disclose financial information. The below metrics, however, exemplify the financial strength of the company.

2019:

Working Capital: 2.6 to 1
Debt to Equity: 0.13

Today, our major clients include:

> **Egencia – 9 years**
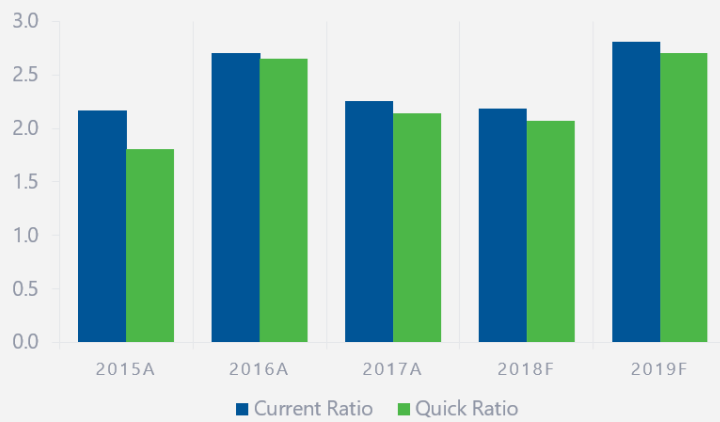> **StubHub – 6 years**
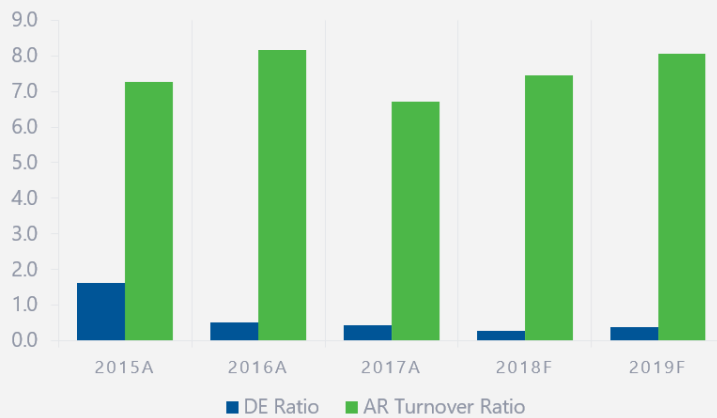> **A Place for Mom – 6 years**
> **Intuit (TurboTax®) – 2 years**
> **Michaels – 1 year**

WORKING SOLUTIONS

Historical Values:

Comparison of Liquidity by Year

Low Debt; Increased AR Turn

WORKING
SOLUTIONS

7.5 RELEVANT EXPERIENCE

Please provide information regarding your relevant experience pertaining to the scope of this outsourcing program.

The fluidity of customer service requires a flexible, responsive workforce. One that aligns with ever-shifting demands, ramping up or scaling down as needed. An on-demand workforce, with everything being in sync to create excellent customer experiences and earn Zillow repeat business.

Ensuring continuous sales and service operations—be they steady state, ready state or future range—requires forethought. At Working Solutions, we will partner with Zillow to prepare and perform for the here and now—and for what's to come.

For Zillow, Working Solutions will recruit, educate and develop agents whose skills and backgrounds best serve your customers in their home searches and selections.

In essence, we will create an on-demand workforce in Zillow's own image. We will achieve this in a couple of ways:

1. **With fast-flex staffing, we can scale up or down as needs and circumstances change, such as seasonal upticks in home buying, rentals or changing market conditions (lower interest rates).**
2. **Through customized education and development (training) of agents via the virtual classroom, led by degreed educators. Agent curriculum is based on your own training. Initial instruction is reinforced with ongoing development throughout the life of a client program.**

Flexible Staffing: We staff 2-to-3 agents per full-time equivalent (FTE). This way, we are able to put the agent headcount where the support volume is needed, and then back off when the volume drops. In a traditional, brick-and-mortar contact center, you have only one person, who equates to 1 FTE. That agent will typically work a 6-to-8-hour block. With multiple agents working those same hours, Working Solutions can stack the headcount together or stagger the shifts to fluctuate with the volume.

We also have 80%+ of our agents working split shifts during the day, which you are not able to do in a brick-and-mortar call center. In addition, we are able to staff heavier on certain days during the week, if needed. Our on-demand business model, which draws agents from across the United States and Canada, enables such workforce fluidity and responsiveness for clients.

Here are a couple of illustrated examples on how flexible we are during the day and week:

Agent Interval Daily Staffing
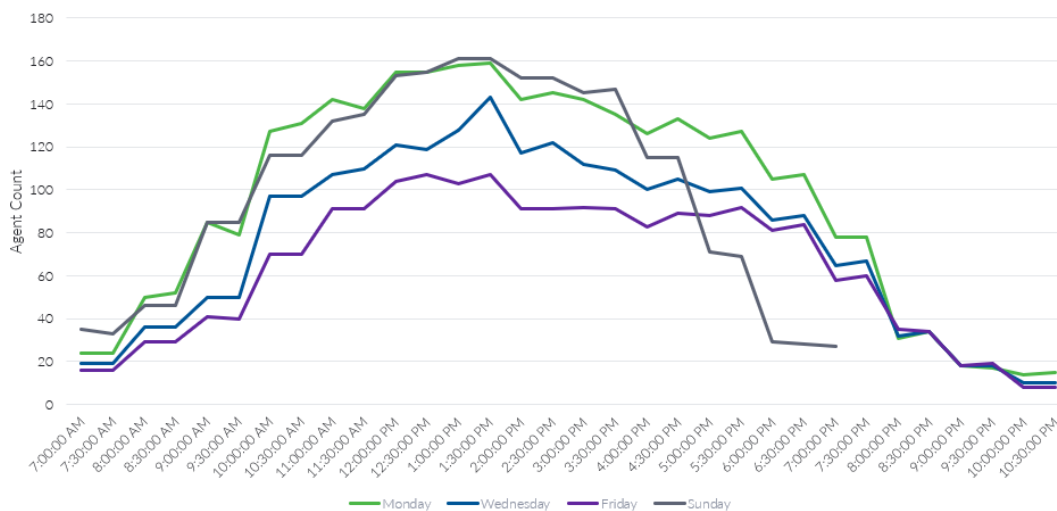
Major Consumer Services Company

Daily FTE Staffed

Major Consumer Services Company

WORKING
SOLUTIONS

7.5.1 CUSTOMER SERVICE EXPERIENCE
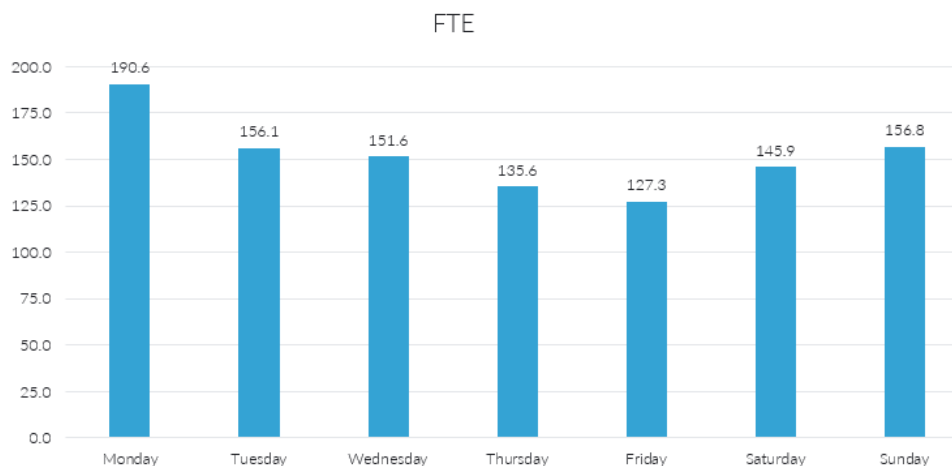
Please list any relevant customer service experience, industry specific and case studies.

After 23 years of serving clients and their customers across diverse industries, Working Solutions is seen as a leader in on-demand, onshore contact center outsourcing. Our agents will immerse themselves in Zillow's business, acting as an extension of your brand.

Here are a few examples of how we work, the methods used, and client successes achieved.

Company Overview

Founded in 1996, Working Solutions began as an idea that sparked an entire industry—on-demand contact center outsourcing. *Read more >*

White Paper – Ready, Steady, Future State

Whatever the state of your business, we ensure nonstop customer service. We're ever-ready with the right resources. *Read more >*

Success Story – Step Up Sales

Working Solutions helped this FORTUNE 100 company meet year-end goals, reducing customer churn during the first 90 days post-sale. *Read more >*

Success Story – Maximize Sales

For this client, Working Solutions trimmed average call-abandonment rates to less than 5%. *Read more >*

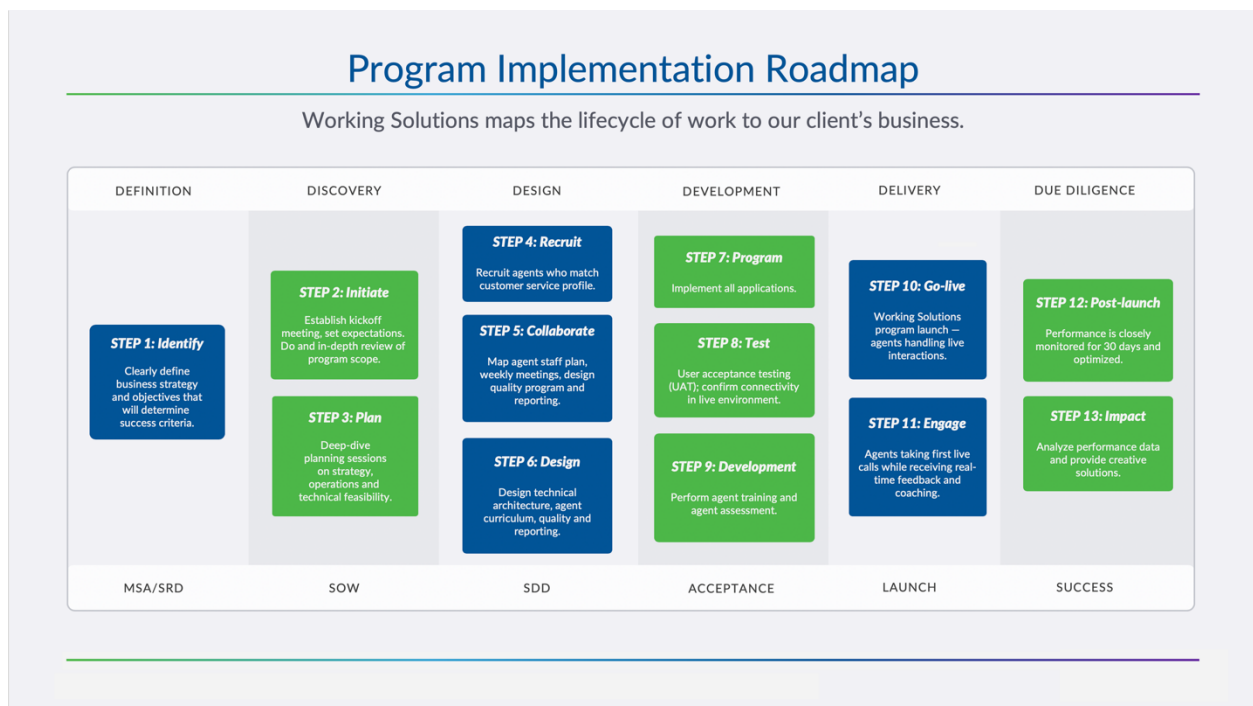### Thought Leadership – Improving Contact Center Operations

Happy workers = happy clients and pleased customers. They all interconnect. *Read more >*

WORKING ™
SOLUTIONS

7.6 PROGRAM MANAGEMENT

Please describe the implementation process and typical implementation timeline.

The dedicated Zillow team will consult with your service operations and internal staff onsite to design, develop and deliver an implementation plan. Your business cycles, customers and culture will be studied as the plan is drafted and put in place. The Working Solutions team will take your service training and adapt it to the virtual classroom, then roll it out to agents via educator-led instruction and continue fine-tuning it while being delivered. In essence, we create an on-demand service workforce in Zillow's image, reflecting the company's brand and beliefs.

The chart below shows the implementation roadmap:

Program Implementation Roadmap

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

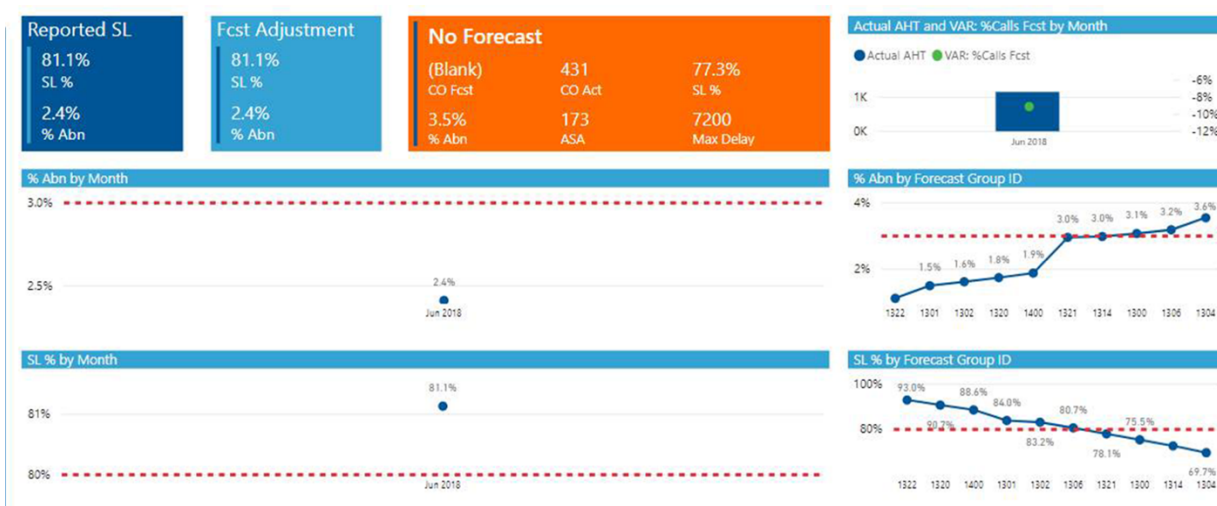| DEFINITION	DISCOVERY	DESIGN	DEVELOPMENT	DELIVERY	DUE DILIGENCE
		STEP 4: Recruit Recruit agents who match customer service profile.	**STEP 7: Program** Implement all applications.	**STEP 10: Go-live** Working Solutions program launch — agents handling live interactions.	**STEP 12: Post-launch** Performance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

Below is the workforce management section, including forecasting, scheduling and real-time management.

WORKING
SOLUTIONS

Please describe your forecasting process

The process of forecasting is primarily handled by our Community Optimization Management (COM) team. It works closely with our Program Success team to ensure our forecasting information is agreed on internally and with the client. We will receive a forecast from the client or generate one based on projected interval volumes.

byMonth

Month	CO Fcst	CO Act	Calls Handled	Acceptable	Abdn Calls	Call Back	ASA	Fcst AHT	Actual AHT	VAR: Calls Fcst	VAR: %Calls Fcst	Offered % Forecast	VAR: %AHT Fcst	SL %	% Abn	Max Delay	% Outbnd vs CallsHandled	% UnAttch Outbnd Calls
Mar 2019	19816	19277	18593	15131	422	2291	47	1207	1282.7	-539	-2.7%	97.3%	6.3%	81.4%	2.2%	6851	66.9%	12.09
Apr 2019	40693	25644	24776	20133	582	3122	70	1184	1213.7	-15049	-37.0%	63.0%	2.5%	81.3%	2.3%	7200	58.3%	11.89
May 2019	39906	22937	22209	17439	458	2915	48	1135	1210.3	-16969	-42.5%	57.5%	6.7%	78.5%	2.0%	2073	57.7%	10.59
Total	168999	114079	110213	87870	2537	13972	55	1176	1259.3	-54920	-32.5%	67.5%	7.1%	79.7%	2.2%	7200	61.5%	10.99

ByDay

Date	CO Fcst	CO Act	Calls Handled	Acceptable	Abdn Calls	Call Back	ASA	Fcst AHT	Actual AHT	VAR: Calls Fcst	VAR: %Calls Fcst	Offered % Forecast	VAR: %AHT Fcst	SL %	% Abn	Max Delay	% Outbnd vs CallsHandled	% UnAttch Outbnd Ca
3/8/2019	1085	927	902	767	14	92	29	1250	1240.8	-158	-14.6%	85.4%	-0.7%	85.0%	1.5%	759	59.0%	12
3/9/2019	251	254	246	218	5	20	24	1253	1305.1	3	1.2%	101.2%	4.2%	88.6%	2.0%	935	67.5%	6
3/10/2019	359	360	352	323	1	40	12	1195	1302.3	1	0.3%	100.3%	9.0%	91.8%	0.3%	66	78.4%	16
3/11/2019	1337	1208	1175	970	22	129	31	1182	1242.5	-129	-9.6%	90.4%	5.2%	82.6%	1.8%	865	61.9%	11
3/12/2019	1218	1186	1144	851	27	140	45	1181	1397.8	-32	-2.6%	97.4%	18.4%	74.4%	2.3%	978	81.4%	13
3/13/2019	1125	1366	1288	755	67	223	124	1206	1461.6	241	21.4%	121.4%	21.2%	58.6%	4.9%	1719	72.1%	9
3/14/2019	1052	1121	1096	857	17	186	35	1204	1323.3	69	6.6%	106.6%	9.9%	78.2%	1.5%	1068	74.5%	13
3/15/2019	968	1015	979	751	25	136	42	1247	1322.7	47	4.9%	104.9%	6.0%	76.7%	2.5%	1230	72.6%	14
3/16/2019	240	284	251	170	13	44	160	1254	1414.9	44	18.3%	118.3%	12.8%	67.7%	4.6%	3024	68.9%	6
3/17/2019	345	380	362	263	11	40	78	1195	1250.0	35	10.1%	110.1%	4.6%	72.7%	2.0%	1450	75.7%	6
Total	168999	114079	110213	87870	2537	13972	55	1176	1259.3	-54920	-32.5%	67.5%	7.1%	79.7%	2.2%	7200	61.5%	10

WORKING SOLUTIONS

For new programs, our COM team monitors the staffing number of a given program. It's based on inputs received from a client specifically: expected number of calls, anticipated average handle time (AHT), service-level requirements (SLAs), call-arrival patterns, utilization/occupancy and others. These data points are used to provide a baseline staffing need from which we create our schedules. This is converted into a recruiting number of agents and full-time equivalents (FTEs), which is sent to our Talent Department to begin the recruitment process.

Working Solutions uses several factors to ensure success in delivering the expected agent need that syncs to anticipated volume for growth, new lines of business and additional support channels/types handled. We have planned timelines for recruiting, system credentials and agent onboarding.

When internally generating a forecasted headcount, our COM team uses variables that include seasonal differences, year-over-year comparisons, sales/growth projections and regression trend analysis. A similar methodology occurs when tracking a forecast to the actual volume. The COM team uses software from the switch and monitors how the actual support volume arrives while comparing it to the planned forecast. If there are variations in the actual call volume, recommendations are made to the client to adjust the rest-of-the-day's, week's or month's schedule to accommodate actual volume.

The COM team aligns with operations weekly to review a capacity-planning forecast for both the short term and long term. The team reviews staffing efficiencies influencers, such as planned vs. unplanned absenteeism, time-off requests, interval level shrinkage factors, average handle time, occupancy and service-level agreements by comparing the planned factors and tracking variances to update the run rates of those factors.

For variations higher than forecasted, the Working Solutions model is exceptionally versatile. Since our agents-to-FTE ratio is around 3:1, we have a base of available agents who can quickly help out should the need arise. We have specific case examples where we have absorbed over 100% more

WORKING SOLUTIONS

volume than forecasted. If this trend continues for a prolonged amount of time, it will trigger our recruiting process to prepare for a supplemental class of agents.

Which staffing and/or scheduling systems do you use?

At Working Solutions, we use call-arrival data to model our staffing needs in 15-minute intervals. We employ industry recognized strategies to identify the correct number of agents needed to handle the calls in an interval and to achieve the service-level goal for the program. Then, we factor in historical data to apply a shrinkage percentage to each interval, ensuring we have the right number of agents staffed to handle the expected volume.

Once that is complete, we post the resulting staffing needs to our proprietary scheduling system and allow agents to select the hours they want to work. Our COM team works in concert with our Program Success team to monitor the schedule and make sure that all intervals are staffed correctly.

This method enables us to staff based on how the calls are forecasted to arrive without the artificial constraints of forcing agents into 4-, 6- or 8-hour predetermined schedules. This also invalidates the need for team or individual agents going through a shift bid process.

Real-time Management

Real-time adherence specialists watch all service levels at an interval level throughout the day to monitor any variances, and course-correct if any interval is out of alignment to SLA targets. Should a program begin to show any negative service levels, adherence specialists will notify the Program Success team and determine if there is a need to add agents in current or future intervals.

Adherence specialists also monitor net staffing requirements at an interval level throughout the day to determine over/under variances and correct by making the necessary staff adjustments. We also proactively use our scheduling system to look ahead for upcoming shrinkage factors. This way, we can backfill to always be appropriately staffed.

Working Solutions imports data from client or internally hosted systems—such as platform, quality assurance and customer relationship management—into our Azure SQL data warehouse. From that point, we merge this data to provide our COM team with the necessary reports to manage real-time performance and alerts. We develop report cards (viewable via Excel) and dashboards (using Power BI) that are either scheduled or updated daily. These reports can be customized, depending on client needs.

The COM team has developed a wide range of reporting to analyze the root cause in any staffing influencers, which may have contributed to the failure of not meeting staffing KPIs. This reporting is captured at an interval level throughout the day and reported to the Program Success team and/or
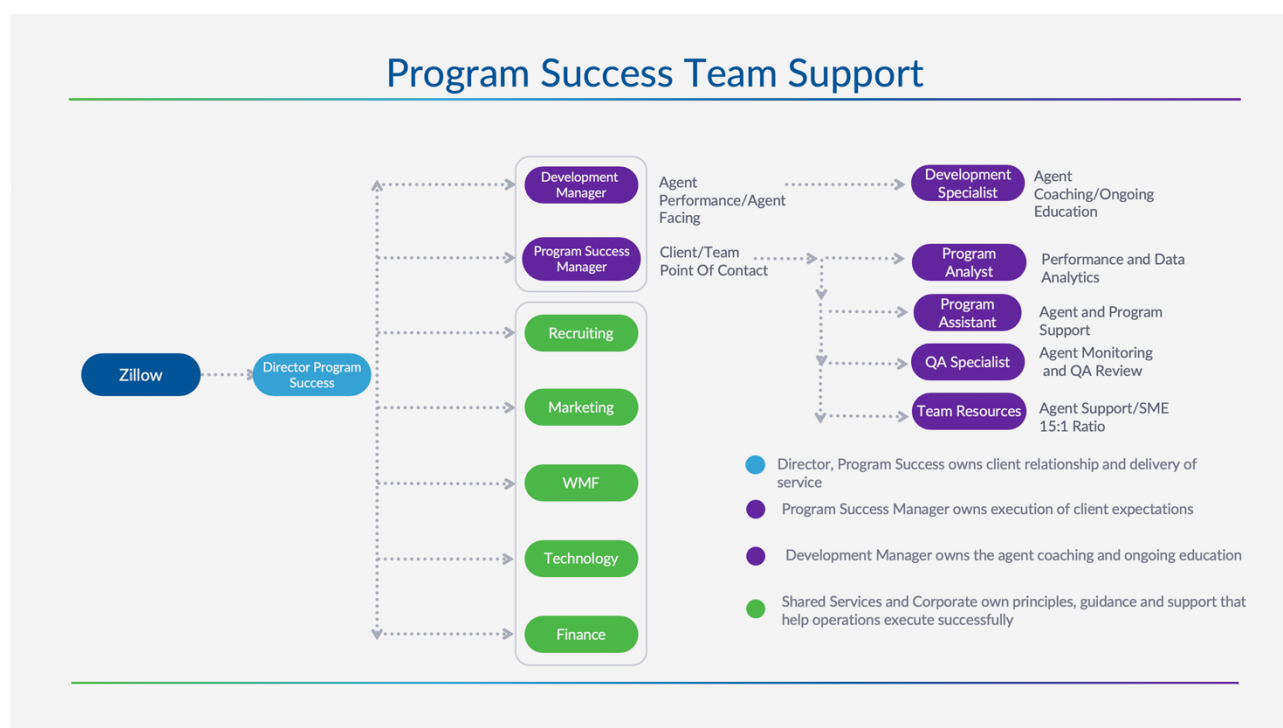
WORKING
SOLUTIONS

client. Staffing influencers tracked include call volume, AHT, occupancy, interval staffing compliance, internal and/or external application outages.

Based on those reports, the COM team can enact various skilling/routing strategies at the agent level to help maintain service levels. Take, for example, a program where all agents can handle customer service or technical support inquiries. Agents are assigned both skills. This way, the COM team can adjust the skilling/routing strategy for agents if one call type shows signs of falling below the agreed-on service level.

Please provide detailed information on the following topics:

Supervisory procedures

Unlike traditional, brick-and-mortar centers, we do not have a program supervisor. The illustration below shows the team structure with a brief explanation of the role. We have found that a program manager and the appropriate support works best in our virtual space and with clients. Based on program size, we will scale and grow the support roles as needed to ensure strong agent performance.

Program Success Team Support

Zillow → Director Program Success

- Development Manager — Agent Performance/Agent Facing
- Program Success Manager — Client/Team Point Of Contact
- Recruiting
- Marketing
- WMF
- Technology
- Finance

- Development Specialist — Agent Coaching/Ongoing Education
- Program Analyst — Performance and Data Analytics
- Program Assistant — Agent and Program Support
- QA Specialist — Agent Monitoring and QA Review
- Team Resources — Agent Support/SME 15:1 Ratio

- Director, Program Success owns client relationship and delivery of service
- Program Success Manager owns execution of client expectations
- Development Manager owns the agent coaching and ongoing education
- Shared Services and Corporate own principles, guidance and support that help operations execute successfully

WORKING™ SOLUTIONS

Quality control on all projects

The overall quality expectations will vary by program and client need. We do not have a one-size-fits-all approach, however, our process for agent coaching, touch and performance improvement is standard across all programs.

- Step 1: Education process
- Step 2: SALT (Strategic Agent Learning Techniques)
  - o 30-90 days with Development Team
    - ▪ Coaching/call review
    - ▪ Workshops
    - ▪ Working Solutions University Activities
- Step 3: Handoff from Development to Operations
  - o Ongoing coaching call review
  - o Dedicated quality improvement specialists
  - o Roundtables/huddles
  - o Call-sharing
  - o Specific modules/ongoing education
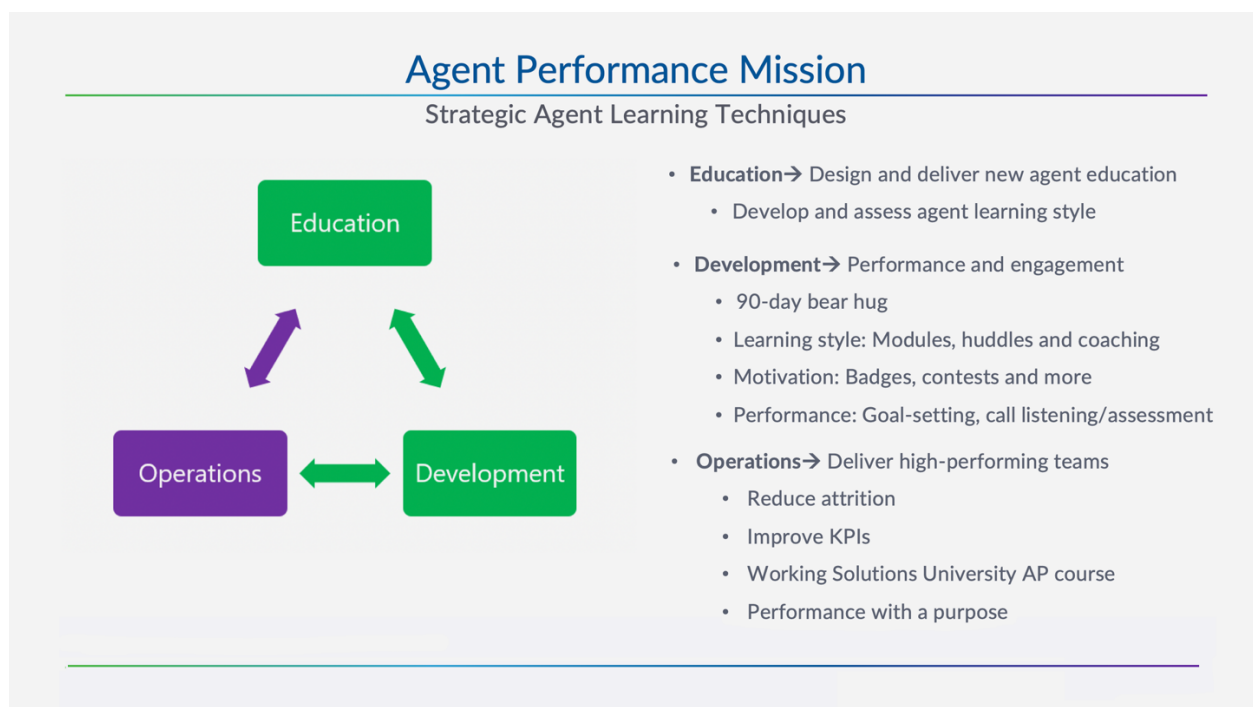
Account Management process and procedures

Our process is very fluid and will take form to the client/program we are supporting. Much like our other processes, it is not a one-size-fits-all approach. We do have the following process that we build off of:

- **Account Management Team Selection**
- **Strategic Launch Plan**
- **Ongoing Client Communication→ Weekly or monthly business reviews, quarterly business reviews, weekly 1:1s.**
- **Performance and Account Review**
- **Planning and Projecting→ Growth, future state, next steps and ensuring the success of the account.**

Performance Management Methodology

Establishes and drives consistent improvement in agent performance

Set Goals
- Identify quality measures using balanced scorecard
- Set specific performance targets for:
  - Individuals
  - Teams
  - Entire program

Monitor
- Agent performance specialist focus on mentoring, not admin tasks
- Training designed to master every call
- Agents understand successful servicing processes require discovery
- Identify concerns and provide value-driven solutions
- Create revenue opportunities if they exist

Evaluate
- Daily/weekly informal feedback
- Weekly business reviews with clients
- Root-cause problem-solving
- Identify gaps with performance

Coach
- Reports measure performance daily and weekly
- Separate Q/A group monitors calls real time
- Agent performance specialist monitor calls
- Clients monitor calls
- Customer surveys provide feedback

Workforce Management process and procedures

We covered the workforce management process—forecasting, scheduling and real-time management—in the questions above.

How many accounts does one account manager handle?

One (1) in most cases.

WORKING SOLUTIONS

How large is your client services group (number of managers)?

5 directors / 10 managers / 5 program analysts

Program process change procedures

The team will consult with Zillow and the internal team to review the process change desired. The program manager or director will complete a detailed process change form. It will include signoffs from both parties before implementing the change. This allows time to review next steps, cost and other considerations.

Problem-resolution process of client issues

This would be client-specific, with different levers and approval processes. We customize the resolution process by program, using visual aids, live-chat support and chatbots.

7.7 CONTACT CENTER INFORMATION
7.7.1 FACILITIES

Are you open 24x7? If not, what are your hours and days of operation?

Yes, as an on-demand contact center provider, we operate 24/7/365. With agents located across the United States and Canada, we offer a well-dispersed, onshore workforce that accommodates always-on clients and their customers. This is especially important as climate change continues to disrupt business. Traditional call centers, which are geographically bound, often find their operations in harm's way of blizzards, hurricanes and wildfires. The versatility of the on-demand contact center model adapts to volatile situations in real time, whatever the weather or circumstances.
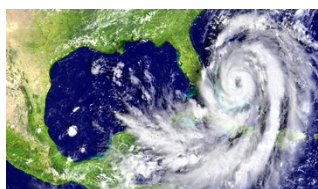
For instance, when Hurricane Matthew struck in 2016, one of our consumer services clients had to evacuate call centers in the Caribbean and Florida. Working around the clock, we reached out to our remote agents in unaffected areas of the U.S. to handle the shifting workload as the storm played out for more than a week.

Given it's hurricane season now, it's worth reading a timely piece by April Wiita, vice president of Program Success at Working Solutions, posted in *Contact Center World*: *"Brace Yourself - 2019 Hurricane Season Begins."*

Do you have blended seats capability?

Yes, we do have blended-seats capability, if by blended seats you mean multiple channels. We do have several programs that in any given shift the agents do inbound and outbound. We have had programs in the past that have done voice, chat and email.

Total number of seats and the percentage of business inbound vs. outbound.

Unlike traditional call centers, we are not restricted to a certain number of seats in facilities because of our virtual network of agents. This enables us to be more flexible and responsive, whatever service situation should arise.

As for the percentage of inbound vs. outbound business, those numbers are 46% and 0%, and inbound/outbound blended 54%.

How many contact centers sites? Locations? Number of seats per location?

As stated earlier, Working Solutions does not have brick-and-mortar call centers, which have limited resources. Instead, our remote agents are part of distributed workforce, operating with great scale and flexibility through a virtual network 110,000+ strong that spans the United States and Canada.

Our business model, which we've perfected over 23 years, enables us to marshal agents on short notice to handle spikes in service or emergencies, such as nor'easters and hurricanes. Limited by their size and set number of seats, traditional call centers cannot ramp up or scale down on-demand like Working Solutions.

Key
- > 500
- 300-499
- 100-299
- < 100
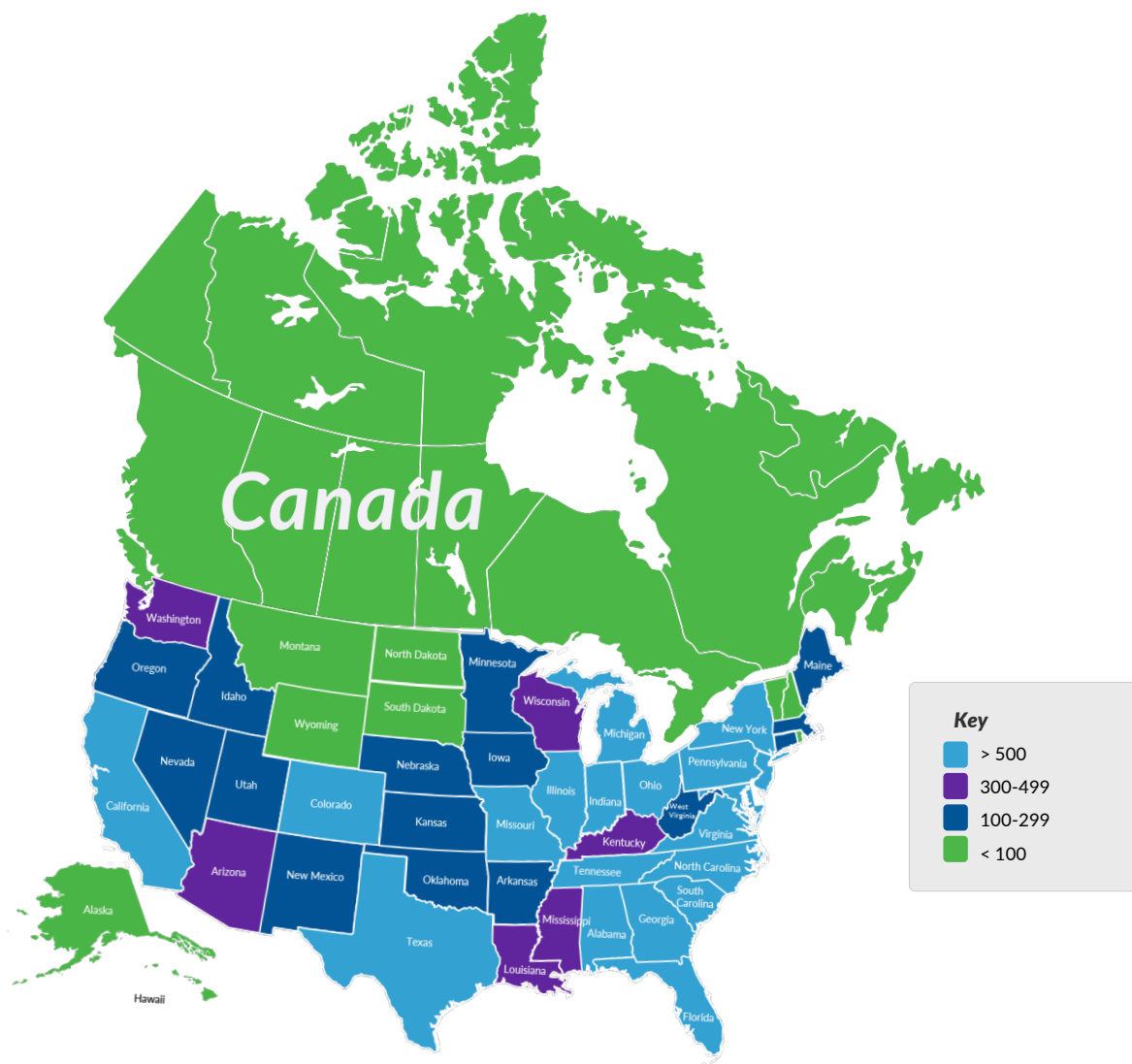
7.7.2 TRAINING

How many trainers do you have? Requirements to be a trainer?

We use degreed educators (featured below) as our instructors. Everyone has a minimum of a bachelor's in education and quite a few have master's degrees. All of them must have at least five (5) years of classroom experience before joining our Education and Development team. They're well-versed in the virtual classroom and long-distance learning, as are their teaching assistants.

Education & Development Team

Working Solutions University

KATIE AGUIRRE
B.S. in Education

JENNIFER BROWN
B.A. in Education

ED MULLINS
M.A. Master of Education

HEATHER BAKER
M.A. Master of Education
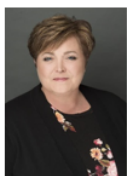
CANDY PERKINS
M.A. in Information and Learning Technologies

DAMIAN CRUZ
B.S. in Education

STACY WAGGONER
M.A. Master of Education

CRYSTAL HOLMES
M.A. Master of Education

To gain more insight into their expertise, here are a few profiles of our educators:

Jennifer Brown **– Jennifer is an expert in educating remote, on-demand agents.**

Crystal Holmes **– Crystal knows how to use virtual flips to further agent education.**

Stacy Waggoner **– To instruct agents well, Stacy believes the smallest things matter.**

Describe in detail your training curriculum for CSRs. How long is your new hire training?

Collaborating with the Zillow customer service team, professional educators at Working Solutions will learn and then adapt your agent instruction to the virtual classroom.

This process entails several components:

1. **Train-the-trainer (TTT) sessions** – Our educators will coordinate a time to fly to your facilities and meet with your head instructors to review all of the training materials. They also will discuss Zillow's brand so we can immerse our agents in your culture, which is essential for success. This way, agents become an extension of your brand.
2. **Curriculum Development** – Educators will develop a customized curriculum to present it in a virtual environment. They will take everything learned during TTT and replicate it for agents. We will strive to keep the same topics and timeline of what Zillow does. We just change the way the content is delivered. We may use gamification on certain topics to drive home those subjects for better retention.
3. **Education** – We will instruct agents well in the Zillow curriculum. Then, there will be a final, comprehensive test and role-playing with an instructor to ensure agents are ready for live calls. After they pass, agents will go into nesting and apply SALT (strategic agent learning techniques), which reinforce what they were taught in the virtual classroom while taking live customer interactions.

For new agents to Working Solutions, we have one to two days of prework they need to complete. Then, we will mirror your internal training timeline for all agents.

Describe your training strategy including all delivery methods for content facilitation.

Agents, like all students, learn at their own pace, in their own ways. Our educators know that and will incorporate several basic teaching techniques to educate them in the Zillow program. They include teacher-led instruction, guided practice and individual practice.

Performance Management Methodology
Establish and drives consistent improvement in agent performance.

DIRECT INSTRUCTION   GUIDED PRACTICE   INDEPENDENT PRACTICE

WORKING SOLUTIONS

Our educators also know that some agents are visual learners while others are auditory. Reading and writing certainly play a part, as does kinesthetic learning. Point is our educators take these differences into account, as the chart below illustrates.
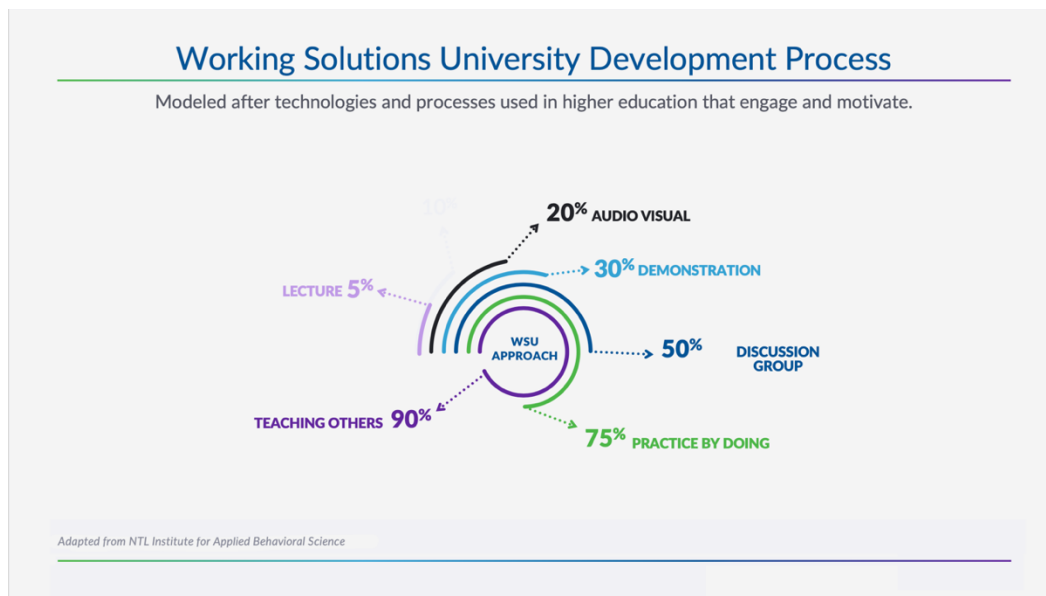

At Working Solutions University (WSU), we employ a learning management system (Canvas) to engage and motivate all agents. Teaching methods encompass games, simulations, micro-learning, role-playing and more.

After the initial curriculum instruction, our Development team, again made up of educators, will continue to coach agents, honing their skills to improve ongoing performance for Zillow.

Describe the training services you provide inclusive of content management and curriculum development processes.

We've touched on content management and curriculum development in earlier questions. It's worth noting that agents can be educated in service and sales for a client since they often merge. We factor such things into our educational process, outlined below.
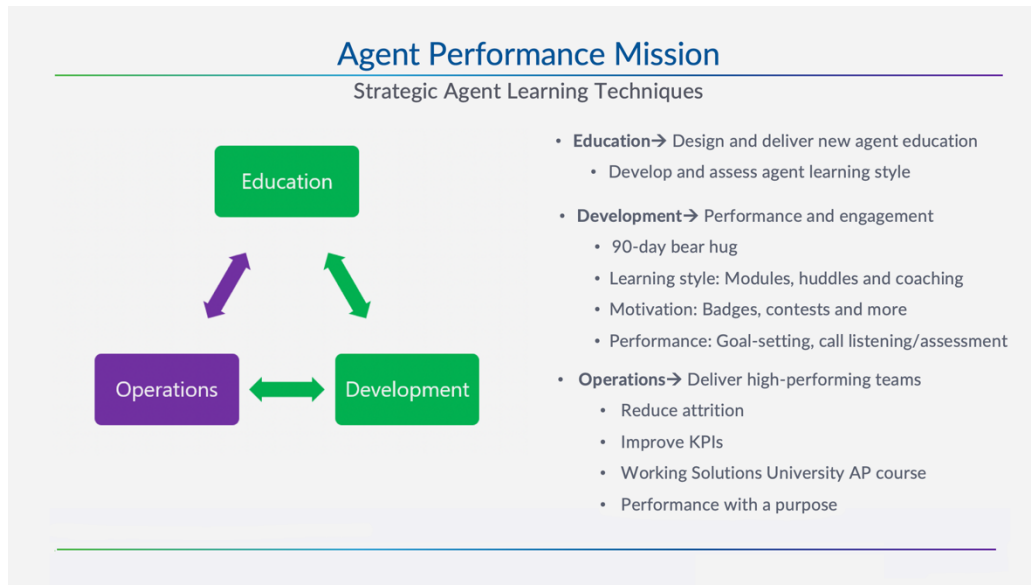
Also, worth noting here is our approach to class size and its impact on agent education. Depending on the client, we try to limit the class to less than 40 agents. This way, all agents will be able to have individual interactions with the educators and their assistants. For large peak ramps, however, we do go up to 50 to 55 agents. We will have one (1) main, degreed educator and one to two (1-2) teaching assistants.

Whatever the size of the virtual classroom, we always strive to make learning personal for agents and customized for the client program. The platform we use and the ways our educators teach increase the effectiveness of the learning.

For instance, a class of say 22 agents can be broken into smaller, interactive groups when needed. An educator can divide it into teams of five or six agents for group discussions—or put agents into 11 groups of two for one-on-one role-playing.

While the agents are in the smaller groups, the teacher and assistant are able to go in and out of each virtual session to ensure everyone is on the right track and answer any questions. Then, the teacher can click another button and bring the entire group back into one classroom for additional educator-led instruction. That advantage is one of the major reasons our educators opted to move forward with the WebEx platform.

WORKING SOLUTIONS

Describe in detail your process for measuring the effectiveness or training. Describe how you identify knowledge and/or skills gaps within your employee base and your process for course recovery.

By this point, we presume you actually mean any knowledge or skill gaps in the Zillow agent workforce being educated by Working Solutions—and not our employees.

To that end, we start out stating the desired client metrics for all agents to achieve. They are baked into agent education from the outset. Goals then are set accordingly to meet or exceed these performance goals.

Monthly audits of quality evaluations are completed for each agent. Agents receive evaluations that are often dependent on their previous month's or quarterly performance. More evaluations are provided to agents who are struggling; fewer are done for those who excel. Listening sessions and independent calibration are encouraged to make sure all agents fully understand how to be successful in each skill needed.

Internally, the monitoring of agent performance occurs daily. We report all scores in real time and share the results with the agents as completed. On a weekly basis, the leadership team will review overall results and act as needed. We evaluate overall and individual results at the end of month as well. All action plans are created based on agent trending and compliance.

Taking it a step further, we will conduct weekly calibrations with the service team and separately with Zillow.
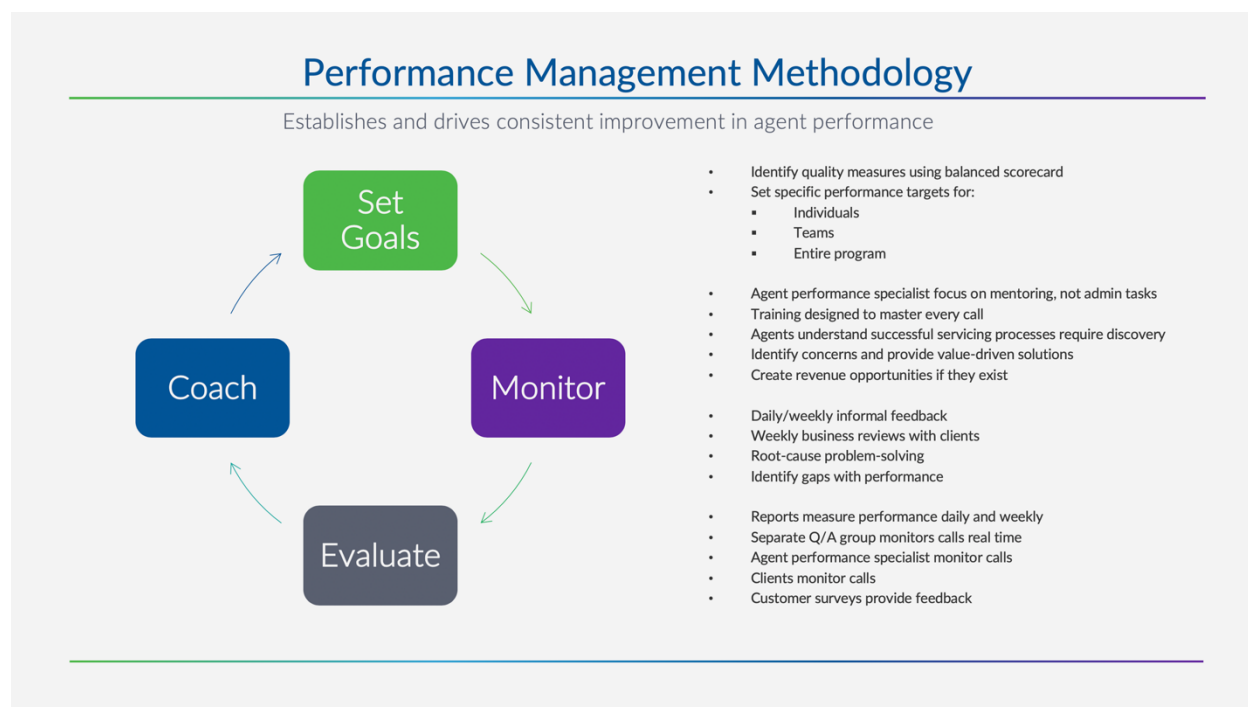
7.7.3 QUALITY

Do you have remote monitoring capabilities? Can clients dial in at any time?

Yes

Do you digitally record all calls? If not, what percentage?

Using the Bright Pattern Platform, all calls will be recorded and stored for 90 days. Recordings can be exported for longer storage requirements.

WORKING SOLUTIONS

Describe your change management process and practices.

Performance Management Methodology

Establishes and drives consistent improvement in agent performance

Set Goals
- Identify quality measures using balanced scorecard
- Set specific performance targets for:
    - Individuals
    - Teams
    - Entire program

Monitor
- Agent performance specialist focus on mentoring, not admin tasks
- Training designed to master every call
- Agents understand successful servicing processes require discovery
- Identify concerns and provide value-driven solutions
- Create revenue opportunities if they exist

Evaluate
- Daily/weekly informal feedback
- Weekly business reviews with clients
- Root-cause problem-solving
- Identify gaps with performance

Coach
- Reports measure performance daily and weekly
- Separate Q/A group monitors calls real time
- Agent performance specialist monitor calls
- Clients monitor calls
- Customer surveys provide feedback

Describe Quality Assurance process.

Within the first 30 days, all agents will receive their initial development through our SALT (strategic agent learning techniques) program. This SALT team will provide the performance and engagement for all agents immediately after the initial training. During this period, agents will receive coaching either through modules, huddles, self-evaluations and/or one-on-ones to meet their individual learning styles. Agents will be motivated by badges and contests so each one can achieve goals and assessments during this time. During this time and afterward, our Quality team works closely with the SALT team to review agent performance, outliers and areas of opportunity for coaching and ongoing education. The Quality team will share metrics and expectations with the Agent team daily. This keeps the team members in the loop on how agents are performing, compared to the group average and program expectations. Agents have access to their own QA scores on Vyne (our integrated agent portal) to assess and improve performance.

Describe processes for call monitoring and expected and realized benefits of the interaction monitoring process.

Internally, the monitoring of agent performance occurs daily. We report all scores in real time and share the results with the agents as completed. On a weekly basis, the leadership team will review overall results and act as needed. We review overall and individual results at the end of month as well. All action plans are created based on agent trending and compliance. Taking it a step further, we conduct weekly calibrations with the team and separately with our clients.

WORKING SOLUTIONS

Describe the agent feedback process and monitoring thereafter.

Monthly audits of quality evaluations are completed for each agent. Agents receive evaluations each month—often dependent on their previous month's or quarterly performance. More evaluations are provided to agents who are struggling and fewer are done for those who excel. Listening sessions and independent calibration are encouraged to make sure all agents fully understand how to be successful in each skill needed.

What percentage of calls are monitored on a monthly basis?

Depending on requirements, we monitor 2 to 3 calls per agent per month. Additional monitors may be done if agreed on by both parties.

Ratio of Quality Assurance Analysts to Agents?

30:1- in some cases 25:1

The Working Solutions Quality Assurance (QA) team would be dedicated to the Zillow program. Processes will change and evolve over time. During the program launch, our team members would work closely to understand client needs and expectations. The team would review calls prior to go-live to gain an understanding of the call flow and desired results. They would do some pre-calibrations to ensure Zillow and Working Solutions are aligned on the form and expectations.

We do not have a one-size-fits-all approach to quality. We use a combination of our best practices—coupled with client needs. We can adopt Zillow's current quality form, system and program on our end or collaborate to create the form.

Our Quality Assurance team and its role are designed to support agents, ensuring a high level of customer satisfaction. Team members monitor a specific number of calls per agent each month to deliver the best level of quality, and if needed, coach agents to improve performance.

The Working Solutions QA team is in constant contact with the Program Management team to ensure success. This ranges from Education to Recruitment to Operations to Development. Our leadership team will review agent calls across the board to better understand the voice of the customer and agent needs. We strive to kick off team calls with random call reviews, believing all levels of the company are responsible for improving quality.

WORKING
SOLUTIONS

The following image is a quality comparison. This client has multiple partners: offshore, onshore, internal and Working Solutions. We consistently outperform every contact center operating for them.

7.7.4 PERSONNEL

What is the average tenure for Agents?

On average, an agent works with us for several years, with the mean being 2.8 years. During that time, an agent might be assigned to only one client or work for several, depending on the duration and requirements of the programs. A number of agents have stayed with us for five years. In fact, it's not uncommon to have agents with a tenure of 10 years at Working Solutions. Beyond that, there are even agents celebrating 15 years of customer service with us. Chief executive Kim Houlne makes a point of recognizing agent milestones.

Enit | Agent since 2001– **Resource leader in the communications industry.**

Kathleen | Agent since 2007– **Works as a corporate travel agent.**

Please describe all languages you can support.

At one time or another, we've supported more than 30 languages to engage our clients' customers. Seeking bilingual agents is built into our corporate culture. During the agent profile assessment, there is a language component that tests comprehension. In the live interview, a talent specialist will assess the fluency—spoken and in writing—that an applicant claims in a particular language. We contract out some of the testing if Working Solutions does not have a talent specialist fluent in that language. The most prevalent languages that clients need are English, Spanish and French-Canadian.

Besides being fluent in a desired language, we also know it's important for agents to "speak the culture" of a client's customers. That means understanding the nuances and subtleties of a client's customer segments, as well as any regional influences.

What is your overall annual turnover rate and by each site? Define your turnover calculation how you factor agent turnover.

Again, Working Solutions does not have call center sites, so we cannot provide those numbers. Our on-demand workforce is virtual and distributed. On average, we run about 8-10% attrition each month and 105-130% annualized.

How do you motivate your Agents to increase sales conversions?

Whatever the task, we motivate agents with rewards to drive superior client performance. Ongoing incentives are worked into their pay structure, and modified accordingly, to achieve desired targets.

For example, at one client, we review the pay structure every six (6) months to ensure: 1) it still makes sense; and 2) agents are being rewarded for the right things. Such incentives create friendly competition and promote teamwork. Individual performance stats are posted daily to both champion and challenge agents. They appreciate knowing where they stand, what needs improvement and being recognized for great work. This approach accomplishes a couple of things: 1) lets the stronger agents act as mentors to those who need help; and 2) bonds the team as a more cohesive unit and increases agent retention on a program. What's more, incentives—achieved or missed—factor into an agent's ongoing program education and performance plans.

Also, we create a VIP perk for our top-performing agents. Several of our programs have enough weekly hours to allow for a VIP schedule option. This gives the best agents a priority-boarding option at the schedule drop. Priority boarding offers first pick and the opportunity to schedule more hours than the standard schedule.

In addition, performance expectations are reviewed monthly, at which time agents can be added or removed from a client program. We have found this to be successful in driving sales and other key metrics.

WORKING
SOLUTIONS

What is your Agent/Supervisor ratio?

This varies from program to program. On average, it's 15:1 or 20:1.

Are your Agents dedicated or shared? What is the percent share vs. dedicated?

Our agents are dedicated to each client program.

Describe programs designed to facilitate employee retention inclusive or employee morale, recognition and overall management of turnover.

As a company, Working Solutions regularly recognizes employee and agent contributions, knowing success is tied to both.

To reduce turnover for agents and employees, we carefully screen all applicants at the outset to ensure a good fit. For employees, a service mindset and professional skills influence hiring. For agents, we look at talent to task, making sure they align with a client's culture, customers and program requirements.

Employee milestones, such as job anniversaries, are celebrated, along with monthly get-togethers. Bonuses are tied to individual job metrics and company performance.

For agents, we motivate them with different perks and spiffs. To focus here on a handful:

- **Spotlight agent of the week with a photo, name and tips for peers.**
- **Put on monthly performance parties and announcements of agent successes.**
- **Use agent portal (Vyne) to call out outstanding talent for all agents to appreciate.**
- **Feature agents on *jobs/workingsolutions.com*—with profiles of their work.**

Marilee | Agent since 2014 – **Works to put customers at ease.**

Beth | Agent since 2006 – **Brings 20 years of travel experience.**

7.8 REPORTS

Please provide a sample of your standard call reports:

There are hundreds of reports that we generate either as standard or ad hoc for each client. Due to client confidentiality, we cannot share the specific reports in this document. We are happy to review in detail any reporting needs that you have.

A good starting point to review the types of reports we provide clients are these two Bright Pattern links that show the range and depth of reporting possible.

- *https://help.brightpattern.com/5.3:Reporting-reference-guide/ReportGeneration*
- *https://help.brightpattern.com/5.3:Supervisor-guide/Dashboard*

Do you have real-time reporting dashboards your clients can view?

All of our reports can be viewed by our clients in real time. Please see links above to look at detailed dashboard options. Again, we would be happy to supply reports but we cannot mask our client names since they are in real time.

Explain your ad hoc reporting capabilities.

Working Solutions is capable of compiling most any ad hoc report, based on the data structure received and metrics measured from the telephony platform. *See links above*.

Yes, Working Solutions measures a large variety of KPIs, and can target any one specific to your business needs. We will mimic your processes and procedures. KPIs include:

Quality – A metric that allows you to see directly how your agents are performing, as well as how customers rate your customer service in general.

Service Level – Measures the percentage of incoming calls that an agent answers live in an established amount of time.

Call Abandonment Rate – Percentage of inbound phone calls made to a contact center that is abandoned by the customer before speaking to an agent. It is calculated as abandoned calls divided by total inbound calls.

Occupancy % – Percentage of time that an agent actually spends handling incoming calls against the available or idle time, which is determined by dividing workload hours by staff hours.

WORKING SOLUTIONS

Average Daily FTE – Average, daily full-time equivalent represents the number of working hours that one, full-time agent completes during a fixed time period. FTE converts workload hours into the number of persons required to complete that work.

Shrinkage % – Measures of how much time is lost in a call center because of things, such as bathroom breaks, call backs, paperwork, team meetings or training. Shrinkage, which is represented by a percentage, is used to calculate how many agents should be scheduled to work a shift so that all calls can be answered in a timely manner.

Overall IB (Inbound) and OB (Outbound) variance Forecast to Actual – The difference between the amount of work per time period projected to be presented and the amount of work that is actually presented.

Intervals Measurements – Tracks the number of intervals meeting the below criteria:

- Above – Number of intervals <u>above</u> forecasted volume.
- At – Number of intervals <u>at</u> forecasted volume.
- Below – Number of intervals <u>below</u> forecasted volume.

Daily and MTD AHT (Average Handle Time) – A metric for the average duration of one interaction, typically measured from the customer's initiation of the interaction. Includes any hold time, talk time and related tasks that follow the interaction.

Daily & MTD ASA (Average Speed of Answer) – A metric calculating the amount of time it takes to answer a typical interaction once it has been routed to the contact center.

Conversion IB (Inbound) and OB (Outbound) – Number of people converted into a sale or contact, divided by the total number of callers (and others) who reached an agent.

Working Solutions has the ability to track any KPIs or metrics special to Zillow's business.

Detail key performance indicators (KPIs) used in each of the functional areas of the contact center. Include definitions, how computed, reporting frequency, and processes and programs in place for corrective actions.

We work with each partner to customize or adopt their KPIs. They can include WFM/service-level expectations, agent metrics and more. In the industry, there are easily more than 100 different KPIs. We work with our clients on their expectations and define them in the scope of work and execute on a daily basis. Our team has the ability to do full reporting on all KPIs that are agreed on and share the results as requested. Above and beyond the standard KPI reporting,

WORKING SOLUTIONS

we will do a weekly business review that will outline the KPI hits/misses, outliers and action plans.

Partner will provide daily reporting on call and SMS activities, including conversion rate, calls delivered, and calls handled, calls per hours, SMS per hours, rep statistics, etc.

Again, we provide daily, detailed reporting on any metrics customized to the specific client.

Live reports must be accessible, which include the Call Status Reports on a daily basis. Call Statistics Detail and Summary Reports, which include information on:

- **Statistics**
- **End of Call Disposition**
- **Call Counts (daily, weekly, monthly and annual)**
- **Reason for call (Call Disposition)**
- **Duration of All Calls in Call Disposition by category**
- **Average Call Duration for Category in Call Disposition**
- **Grand Totals for all above information**

All live reports, including any variables you would like to measure customized to your needs, are accessible on a daily basis.

- *https://help.brightpattern.com/5.3:Reporting-reference-guide/ReportGeneration*
- *https://help.brightpattern.com/5.3:Supervisor-guide/Dashboard*

Statistics with interval filter reports can be sorted also by city, date or date and city together.

Yes, reporting can be customized to include city, date or date and city together.

Sending calls with questions (elevated calls) to a specified email address allowing Client to pick up those calls requiring follow-up.

Working Solutions will outline an escalation process that best fits your needs. Two of our current processes are listed below:

- We have a form that is required to be completed before submitting the customer follow-up requests to our dedicated inbox. This data then is communicated to the client for action.

- Working Solutions also uses a ticketing system where agents communicate interaction follow-up or request outside of our scope for support. Clients are given access to this system and assigned a specific group where desired requests can be routed.

WORKING SOLUTIONS

7.9 SYSTEMS AND OTHER QUESTIONS

Please explain your Disaster Recovery/Systems Redundancy

Our business continuity, disaster recovery and resiliency plans are customized for each client. They are distributed to all key management personnel and updated semi-annually. Copies of the plan are kept locally, as well as on a corporate server located in Dallas, Texas. All plans are backed up in the Azure Cloud.

Please review the _attached document_ for details, including:

- **Prevention**
- **Distributed agent workforce locations**
- **Process flow**
- **Recovery**
- **Emergency management team**

Describe your back-up and redundancy. Do you have a backup generator at each site and the proposed location to handle this business?

All platform services are provided via the cloud and all (multiple) data centers are fully redundant to include UPSs, generators, A/C components and dual-path electrical and telecom paths.

Agent redundancy is ensured by having an on-demand, onshore workforce dispersed throughout the United States and Canada. Our virtual business model enables us to shift work and resources as business demands fluctuate and weather changes.

Do you have a redundant internet and telecom providers?

Multiple carriers are used for internet access and telephony routing for inbound and outbound calls

How much downtime has your contact centers experienced in the past 12 months due to systems, electrical and weather-related incidents?

There has been zero downtime during this period—none occurring due to system-, electrical- or weather-related events.

What days of the week and hours is your IT center staffed?

Our IT operations are manned 24 hours, 7 days a week.

How many people do you have in your systems department?

WORKING
SOLUTIONS

We have 14 IT professionals.

Describe your technology and systems as it relates to this project for the following:

- **CRM – N/A**
- **Dialer- Bright Pattern. Dialer, if applicable supports preview, predictive and progressive dialing.**
- **ACD – N/A**
- **Email – Use Zillow's system.**
- **Live Web Chat – Use Zillow's system.**
- **Social Media – N/A**
- **Digital Recording – Bright Pattern: 100% of calls are recorded and stored securely.**
- **Workforce Management – Vyne, proprietary Working Solutions agent website where leaders and agents see program status and alerts, receive business updates, review performance metrics, and share other real-time information. (Section 7.10 of this RFP offers a more in-depth look at Vyne.)**
- **Chatbots – N/A**
- **Artificial Intelligence – N/A**

Long-distance (LD) providers?

Working Solutions uses multiple LD carriers.

Compliance and Certifications (PCI, HIPAA, SOC2, etc.) PCI is a requirement.

Working Solutions is PCI Level 1 certified. An *AOC is provided here*.

Ensuring compliance: For the Payment Card Industry Data Security Standard (PCI DSS), Working Solutions completed its last audit in October 2018. The 2019 audit is being finalized now. All parts of platforms and operations are Level 1 certified for credit card transactions. Covers security management, network architecture, software design and development, storage and transmission, and remote-access policies. Vulnerability scans of systems are done quarterly.

Going beyond certification: Industry standards certainly have their place. They are, however, are just the price of admission to safeguard data and privacy. That's why at Working Solutions we invest in common-sense measures, such as data masking and securing agent desktops, if required, to further ensure consumer protection and privacy.

Integrated approach

To protect information, Working Solutions focuses on agents, infrastructure and data for an integrated security strategy.

Agents: Agents adhere to strict administrative processes and physical security standards. Included are ethics and security training, clean-desk policy, business associate agreements and confidentiality

WORKING SOLUTIONS

compliance for HIPAA (Health Insurance Portability and Accountability Act). Rigorous background checks and drug screening are conducted.

Infrastructure: Working Solutions offers multichannel contact center application services. Residing in a hardened environment, these services provide peace of mind for clients and their customers. This work encompasses disaster recovery, redundancy and failover. Network security includes firewalls, redundant technology and intrusion detection.

Data: Technical standards are met for data protection, ranging from Payment Card Industry Data Security Standard (PCI DSS) Level 1 security for payment card transactions to HIPAA compliance for healthcare. Our work adheres to documented and auditable policies, procedures and processes to protect physical data—as well as encryption and monitoring for data in transit.

7.11 REFERENCES

Please provide three (3) reference for which you have provided inbound customer service. Include length of relationship and a brief overview of services provided.

Company: Sabre

Service Provided: *Inbound Customer Service/Travel*

Contact:	**Ben Brewster**
Phone:	**(407) 745-3434**
Email:	*Ben.Brewster@sabre.com*

Company: Datalot

Service Provided: *Customer Inquiry/Screening*

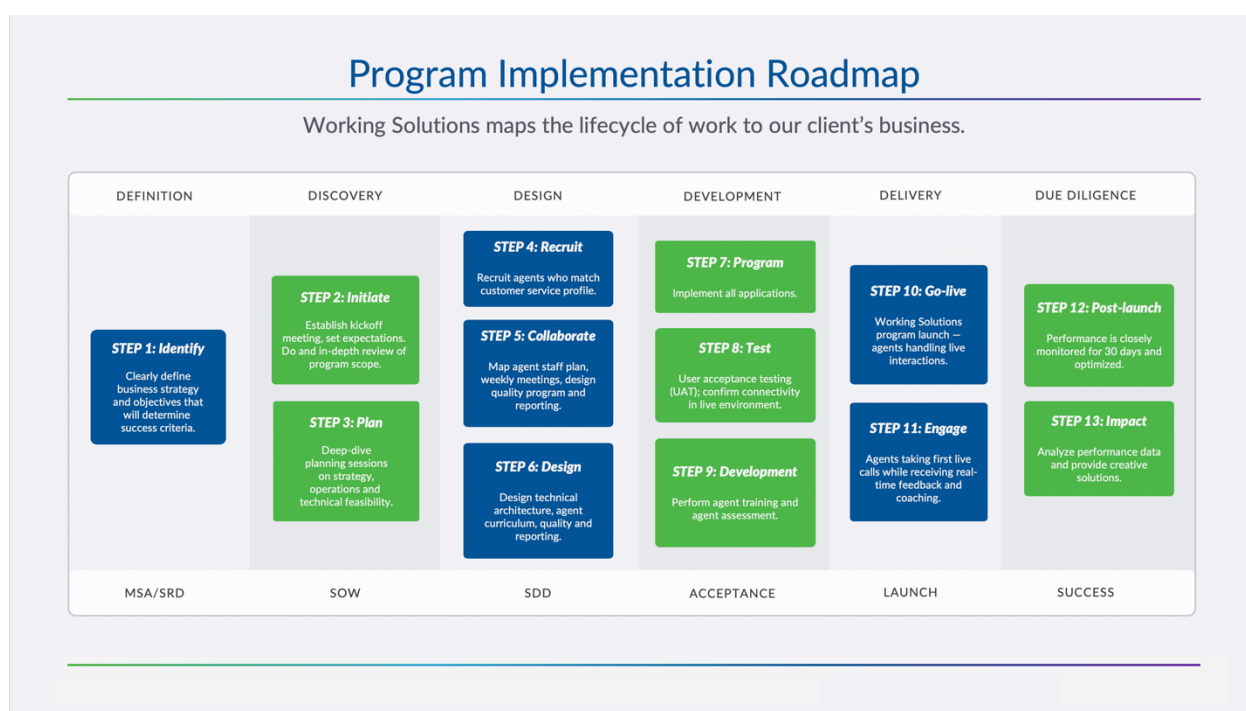|	
Contact:	**Jesse Zakarin**
Phone:	**(212) 372-7415**
Email:	*jzakarin@datalot.com*

Company: Apple Leisure Group

Service Provided: *Assist consumers and travel agents in the booking of hotel, air, car rentals and activities*

Contact:	**Scott Quigley**
Phone:	**(469) 899-8345**
Email:	*squigley.apple.net*

WORKING SOLUTIONS

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 4: Recruit Recruit agents who match customer service profile.	**STEP 7: Program** Implement all applications.	**STEP 10: Go-live** Working Solutions program launch — agents handling live interactions.	**STEP 12: Post-launch** Performance is closely monitored for 30 days and optimized.
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 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 8: Test** User acceptance testing (UAT); confirm connectivity in live environment. **STEP 9: Development** Perform agent training and agent assessment.	**STEP 11: Engage** Agents taking first live calls while receiving real-time feedback and coaching.	**STEP 13: Impact** Analyze performance data and provide creative solutions.
MSA/SRD	SOW	SDD	ACCEPTANCE	LAUNCH	SUCCESS

WORKING SOLUTIONS™

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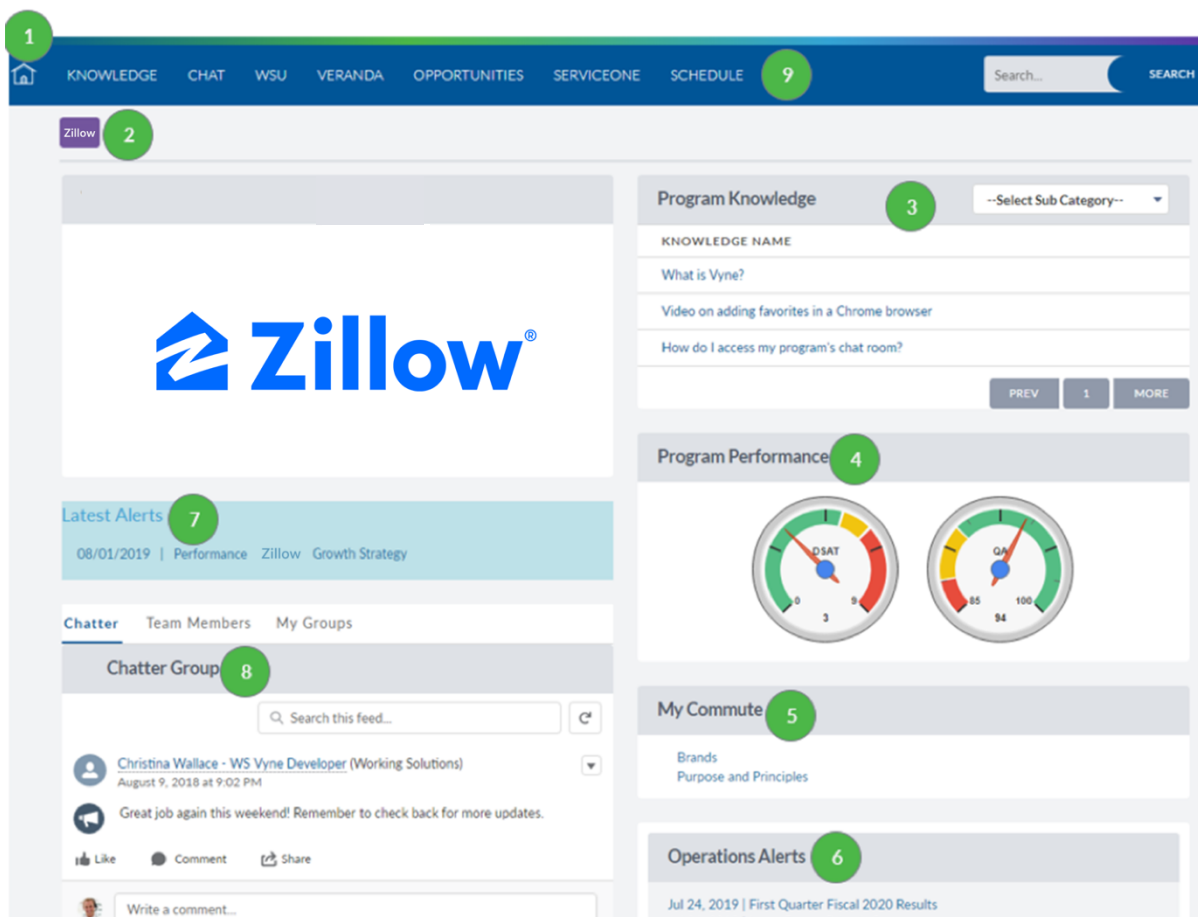
1. **Main Homepage** – This is the first page an agent sees at every login. Here, we post company-wide announcements and videos of related news. On the right, agents access their schedules at a glance and any recent messages they need to view.

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.

WORKING
SOLUTIONS

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.

7.12 SCOPE OF WORK AND PRICING STRUCTURE

Remote Agent Setup	Price
Remote Agent Onboarding*	$350.00 / FTE
Remote Agent Preparation & Training	$23.00 / Hr. / FTE
Custom Programming & Tech Setup	$200.00 / Hr.
Train-the-Trainer**	$220.00 / Hr.

* Does not include agent background checks, which will be billed as a pass-through cost to Zillow, if required.
**Zillow will be responsible for train-the-trainer travel arrangements (flights, hotel and transportation).

Remote Agent Pricing	Price
Productive Hour Pricing – Define as: Productive Hour" or "PHr" is the equivalent of sixty minutes of combined "Handle Time" (Task Time + Hold Time + Wrap Time (aka ACW or After Call Work) and "Available Time" (aka "Idle Time", for example when an agent is logged in to a telephony system waiting for tasks (Calls, SMS, Emails to be delivered.) For avoidance of doubt, stand-by time, coaching, training, breaks, lunches, e-learning, team meetings and any other rep time except that which is dedicated to handling Zillow contacts or transactions or waiting for Zillow contacts or transactions are not considered part of a Productive Hour.	$26.85/Productive Hour

Estimated Pricing for Bright Pattern Voice Platform:	Price
Initial Setup Costs	
Bright Pattern Platform Setup – Voice Only	$7,000.00
Phone Number Activation per number	$10.00
Port Fees per number (optional)	$15.00
Monthly Recurring Costs	
Voice Only Channel per concurrent seat*	$120.00
Supervisor/Admin Login	Included
Monthly fee per phone number	$5.00
Per Minute Voice (Inbound and Outbound)	$0.019 / minute
Technical Account Management (Optional)	$200.00 / Hr.

*Concurrent Seat count is determined by the max number of agents logged into the Bright Pattern system at the same time in a calendar month. **Additional setup or monthly costs may come up during full tech discovery. No additional costs will be added without prior authorization from client.

WORKING SOLUTIONS