

DIANA IRELAND

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VP / DIRECTOR – CUSTOMER SERVICE

Growth Strategies / Client Care / Call & Contact Center Operations / Customer Satisfaction / CRM / Multisite Operations / Reorganizations / Continuous Process Improvement / Change Management / Quality Management / Automation / Cost Reduction / Budgets / SLAs / Customer Relations / QA / Recruiting / Team Building / Training / Staff Development / FINRA / LIMRA / Client Retention / Business Development / Sales Management / e-Commerce / Solution Sales / Dispute Resolution / Lead Generation / Cross-Selling / Performance Measurement / Workforce Management / Succession Planning / Leadership Development / Incentive Programs / Compliance / Startups / Turnarounds / Learning & Development / Reporting & Analysis / Systems / e-Learning

As a customer care and call center executive, I have an outstanding record of achievement in demanding environments. In addition to directing large client service, call center, chat, automated and other support organizations and high-performance day-to-day operations for *Transamerica / AEGON*, I have designed and implemented successful process, system, training and organizational improvements.

My efforts have generated record gains in revenue, customer satisfaction and client retention while holding down operating costs and increasing profits. I have assembled, trained and guided large cross-functional teams that contributed directly to strong sales growth, capturing hundreds of millions in repeat business, renewals, add-ons and cross-selling opportunities. Highly adaptable, I have directed major change management programs, including large-scale restructurings, aggressive growth initiatives, dramatic performance turnarounds and rapid startups of new operations.

Leveraging a shirtsleeves management style, I balance empowerment and accountability to achieve results that exceed corporate, market and client expectations. Directing client services organizations serving tens of thousands of customers with billions of assets under management, I have managed operating budgets in excess of \$50M and diverse multidisciplinary teams comprising more than 450 professionals dispersed across multiple sites around the United States. A dedicated collaborator, I am known for pitching in on projects that go far beyond the limits of my job description.

At your organization, I could make an immediate strong impact by:

- Planning & executing aggressive growth strategies**
- Streamlining processes & systems to boost efficiency**
- Managing highly effective multisite client service operations**
- Ensuring rigorous regulatory compliance & strict internal controls**
- Delivering best-in-class levels of client service, support & satisfaction**
- Capturing new business, retention, cross-selling & add-on sales opportunities**
- Recruiting, training, mentoring & motivating top-performing multidisciplinary teams**
- Fostering a culture of innovation, continuous improvement & organizational excellence**

Others have described me as a natural leader, high-energy motivator, sharp analyst, forwarding-looking strategist, persuasive communicator, synergistic collaborator and intuitive problem solver. I embrace challenges and perform well in fast-paced high-pressure environments.

My education and credentials include a **BS degree in Business Administration from Ithaca College**, as well as ongoing professional development training and certification, including **FINRA Series 6** licensure.

CAREER HISTORY & SELECTED HIGHLIGHTS

Transamerica, a leader in insurance/financial services and a member of the \$40B AEGON family of companies. Steadily promoted, roles include:

VP, Customer Care for Retirement Products, 2009-2016. Promoted to direct five client support call centers. Led process, systems, training and other improvements, driving record improvements in revenue, service and customer satisfaction. Managed 450 staff, including FINRA-licensed inbound/outbound representatives, as well learning & development, QA, workforce and research teams. Responsible for \$50M annual operating budgets and call center SLAs.

Leveraged call center inquiries to grow sales \$600M. Saw untapped opportunities to retain business from existing clients coming to Transamerica's customer care channels. Working closely with senior sales leadership, developed processes, systems and training to strengthen handoff of clients with new, retention or add-on selling potential. Drove a 50% increase in traffic of support/care online, chat, email and call center referrals. Contributed to a 120% jump in sales from \$500M to \$1.1B in less than four years.

Accelerated training & slashed onboarding costs. Customer care training at Transamerica was excessively time-consuming, costly and inefficient. Directed acquisition and implementation of SMART technology learning platforms enterprise-wide. Enabled trainers to reach multiple locations concurrently, reducing required training staff headcount. Slashed cycle time for achieving core competencies by 60%, from 60 days to 25 days. Captured \$900K in first-year onboarding and training savings.

Realigned call center coverage to save hundreds of thousands. Transamerica's annuity division call center volume was falling while the retirement product team's volume was increasing by 20%. Recognized a need to reengineered staffing and increase cross-training. Implemented a new expedited learning program in retirement products/services for existing annuity reps, cutting training time 40%. Shifted call overflow between teams on an as-needed basis, saving \$650K in expected staffing costs. Maintained or improved quality and satisfaction with no new headcount.

Drove VRU upgrades, saving millions. Transamerica's existing voice response unit (VRU) platform was obsolete and failed to keep up with rising volume, client expectations and fraud threats. Researched, evaluated, sourced and negotiated for procurement of a new system from Nuance capable of being overlaid on the existing IVR platform. Enabled advanced natural language and voice biometric security protection capabilities, as well as scalable expansion capacity and other features. Leveraged the automation/self-service solution to sharply reduce staffing and handle time. After proving the system in a single line of business, expanded enterprise-wide, saving \$3.5M annually.

Cut attrition & boosted performance with an incentive program. Excessive all center staff at Transamerica was costly and impeded efforts to improve client satisfaction. Working closely the sales organization developed an aggressive incentive compensation program for call center representatives, promoting referrals. Offered new income opportunities while generating a steep rise in cross-selling revenue. Stanching the exodus of top talent, cutting turnover 10%.

Director, Call Center, 1998-2009. Promoted to direct two customer service call centers. Developed numerous systems, process, training and performance management improvements, outperforming all quality, revenue and satisfaction targets. Managed 250-plus multidisciplinary staff and budgets in excess of \$25M. Previously, **Manager of Client Relations.**

Saved \$1M with a call center reorganization. Recruiting, training and compensation costs in the high-cost NY-area market were becoming unsustainable for Transamerica. Presented and won approval from senior leadership for a plan to move the NY call center

to a new facility already opened in St. Petersburg, FL. Offered aggressive relo packages to top staff and management talent. Completed seamless transition on time and on budget. Leveraged the new locale to capture significant labor cost, benefits and facilities/real estate savings.

Developed a scalable staffing/systems model to meeting rising demand. While planning to relocate Transamerica's NY-area call center operations to Florida, determined that steep client, account and asset growth would steadily continue. To meet the projected rise in volume, future-proofed the new operation with provisions for increasing staffing levels and infrastructure to enable cost-effective, scalable growth. Over a five-year period, staffed up from 40 to 150 reps while tightly reining in operating costs to maintain strong P&L performance.

Doubled sales in only two years. Asked to take over Transamerica's Asset Retention team, tasked with growing revenues from existing accounts. Conducted a 360° assessment of client relationship management practices, processes, systems and training. Developed and introduced workflow and training improvements to accelerate response times and effectiveness. Increased product knowledge to drive new cross-selling/add-on opportunities. Grew IRA sales 100%, adding tens of millions in new AUM in less than two years.

Improved interdepartmental cohesion & forged potent synergies. Recognizing that a disconnect between Transamerica's call center operations and the rest of the organization resulted in silos, inefficiencies and lost opportunities, launched a cultural transformation initiative. Collaborating with top corporate management and HR, introduced an internal communications program to educate all areas of the company on the functions, benefits and impact of the call center teams. Incorporated the strategy into all new hire onboarding. Increased awareness, incubating synergistic collaboration and cross-pollination at all levels throughout the firm.

Leveraged systems improvements to boost KPIs. Transamerica needed to improve call center efficiencies and effectiveness. Working closely with IT leadership developed and implemented new systems and tools, including an automated call center agent scorecard solution. Introduced a new proprietary CRM solution, creating a "one-stop-shopping" platform for reps to manage all their activities. Increased a multitude of KPIs. Boosted efficiency 50%+. Cut call wait times 22% and complaints/escalations 11%. Contributed to a steep rise in client satisfaction.

EDUCATION & OTHER CREDENTIALS

Bachelor of Science degree in Business Administration from Ithaca College.

LIMRA.

Series 6 License.

PERSONAL

Active in a number of charitable, social service and civic organizations, I have been a member of the Charitable Contribution Committee at Transamerica.

In my spare time, I enjoy running, cooking and home decorating.