Driving Business Value Through Performance Management

by Ken Forbes
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EXECUTIVE SUMMARY

Workforce optimization enables businesses to maximize productivity to meet the challenges of today’s business environment. A key component of workforce optimization is performance management, which consists of establishing and assessing performance standards and consistently communicating results to all levels of the organization.

Performance management enables business executives to be informed as significant events and trends occur in their businesses. It lets frontline managers align performance with corporate goals and identify areas of opportunity and concern. It provides employees clear communication regarding performance expectations and consistent feedback regarding results.

Current approaches to performance management are cumbersome, inflexible, and only solve part of the problem. They don’t extend throughout the organization; they don’t translate organizational objectives down to the level of the individual manager or employee; and they don’t provide a linkage between business consulting and the systems required to monitor and manage performance. As a result, employees don’t work at optimal productivity, which negatively impacts revenue performance, employee satisfaction, and customer retention.

What is required is a holistic approach to performance management—a complete solution designed to assist the business in identifying the appropriate metrics to maximize value for the business, to translate them into objectives for managers and employees throughout the organization, and to provide employees at all levels of the organization the capabilities and feedback they need to optimize their performance.

Implementing the performance management methodology can provide significant bottom line business benefits, potentially yielding millions of dollars in annual savings. Benefits include:

- Increasing employee productivity
- Increasing customer satisfaction and retention
- Increasing revenue
- Reducing employee attrition and costs associated with it
- Reducing performance management workload
- Reducing hiring and training costs
- Reducing learning curve for new hires
- Reducing IT workload

Furthermore, the performance management system can be used to measure and optimize any business process, including the performance management process itself. This can result in a self-perpetuating “virtual cycle” of continued performance optimization, leading to exponential improvement over time.

Blue Pumpkin Advisor is the first of its kind—a comprehensive solution to performance management. Combining enterprise-class performance management software with tailored business consulting to evaluate the business’ existing performance management process, Advisor represents a unique advance in performance management. By optimizing the productivity of employees and business processes across the enterprise, it enables businesses to increase productivity, revenue, and customer satisfaction, while reducing employee and customer churn.
BUSINESS PROBLEM

The Challenge: Increasing Business Productivity by Optimizing the Workforce

Businesses today are under tremendous pressure to improve their bottom line. This means enhancing or protecting revenue streams and improving customer loyalty, while at the same time holding steady or even reducing costs. And with personnel costs making up between 50 percent and 90 percent of most businesses' operating budgets, this means improving the effectiveness and efficiency of the people in the organization.

This is the goal of workforce optimization. Workforce optimization is a combination of systems and best practices that enable collaboration, support informed decision making, and enable businesses to streamline their fundamental business processes. Blue Pumpkin splits workforce optimization into three major areas: planning, execution, and evaluation. Performance Management is aligned with the Evaluation stage of this cycle.

Business Goals: Increase Productivity, Revenue, Customer Satisfaction. The role of Performance Management in Workforce Optimization is to increase business productivity through metrics, performance assessments, and communications.

Performance Management: A Critical Component of Workforce Optimization

Having the right systems and methodologies at the evaluation stage is one of the keys to successfully implementing workforce optimization. This is where performance management comes into play.

You can't improve what you don't measure. Performance management is a system for establishing operational standards and metrics, assessing performance results, and communicating key information at all levels of the organization to achieve business goals. When used effectively, a performance management system is a powerful tool for linking a company's long-term strategy with its day-to-day business decisions.

For a service organization such as a contact center, visibility of key quantifiable metrics at all levels of the operation enables it to:
• Align and communicate corporate objectives to the level of the individual agent
• Measure operational progress and identify trouble spots to quickly respond to critical performance areas
• Empower employees to increase performance and service quality through clear performance expectations and continual feedback
• Accelerate decision-making and continuous improvement through a organizational feedback loop

Previous approaches to performance management provided incremental improvements in the areas for which employees were nominally responsible: for example, to shave a few seconds off a contact center phone call or squeeze a few pennies out of a supply chain. Increasingly, however, businesses are taking a more holistic view, and this in turn requires changes in their approach to performance management.

In particular, businesses are increasingly realizing the importance of business drivers such as influencing revenues and profits via increases in customer retention and loyalty. As a result, in customer-facing organizations such as contact centers, new value-oriented performance management metrics are now being used to replace and augment the old, time-based metrics used for the past quarter of a century. This is leading to a greater benefit to the business, but it also means businesses need to get a better handle on quantifying value delivered by the employee and tying it to high-level business goals.

The performance management discipline originated in the contact center. However, the approach is increasingly being used to bring value to all organizations throughout the enterprise. Whether in operations, sales, research and development, marketing, manufacturing, or distribution, the goals of employees in every department across the enterprise need to be aligned with the business’ overall goals, and management needs to manage and measure them to ensure they are driving maximum value into the business.

Performance Management Solutions Address Pain Points at All Organizational Levels

Stakeholders throughout the organization have significant needs that can be addressed by a performance management solution. Pain points experienced by executives, human resources, line managers, and employees are listed below.

**CEOs, COOs, and CFOs:**
• Need to compress the time between analysis and decision, and between strategic decision and tactical action
• Are frustrated because their business is not flexible enough to change business models and priorities without waiting for programmers to finish custom development projects
• Need to closely monitor and improve the aspects of their business that make it unique
• Want to maximize customer satisfaction and thus protect and enhance the business’ revenue stream
• Have limited visibility into issues impacting performance because they must try to combine “apples-and-oranges” data from different systems across the organization to understand how various factors affect employee, management, and enterprise performance

**Human Resources Management:**

• Must maximize employee relationships and satisfaction
• Need to improve employee retention and reduce recruiting and hiring and training costs
• Need to weed out new hires who are substandard performers as quickly as possible
• Worry whether the company is legally protected against accusations of unfair treatment
• Need to reduce the effort required by any performance management process

**Line Managers:**

• Need a single place to organize and present all employee and customer information related to performance
• Must train new supervisors who aren’t familiar with their organization’s best practices or how to implement them
• Must identify and improve inconsistent proficiency and performance among employees
• Need to know how their department and employees are performing on a daily basis

**Employees:**

• Often feel they are treated unfairly because the performance feedback they receive is anecdotal, untimely, or inconsistent
• Lack clarity about how they are evaluated
• Are out of touch because they cannot see how their personal actions are linked to corporate goals

**Common Challenges in Performance Management**

Beyond the initial establishment of performance metrics, the most challenging performance management issues typically revolve around the complexities of integrating an organization’s data sources, technologies, and business processes.

• **Performance Data Scattered**—Managers constantly need an accurate snapshot of their operations, whether specific to a particular area or for a 360-degree view of the workforce. But since critical employee and customer data is housed in different applications (e.g. ACD, Workforce Management, Quality Management, CRM, HR, Payroll, Financials, etc.), IT departments often provide managers with unfocused
reports full of raw data instead of the key information they need to manage operations. Employees are frustrated because the performance reports are infrequent and provide neither relevant feedback nor an appropriate course of action.

- **Limited Operational Visibility**—Without timely, relevant information, managers and executives have limited visibility into their operations and cannot quickly answer mission-critical questions such as:
  - What were the most critical service problems yesterday? Which employees were involved? Was this day an exception or a trend?
  - Who are the under-performing employees that need coaching? Were there any attendance or utilization problems yesterday?
  - What performance measures represent an exception or a trend?
  - What are the key indices to watch daily, weekly, monthly? Which indices were “off plan”? Why? Who was involved?
  - Who were my best employees yesterday? What were those key areas in which they excelled? For those employees, was this day an exception or a trend?
  - Who were my "least-best" employees yesterday? What were their key areas of off-performance? For those employees, was this day an exception or a trend?
  - What were the attendance issues yesterday? Was this day an exception or a trend?

- **Best Practices Not Standardized**—The inability to access performance information from a single application contributes to inconsistent reporting and therefore inconsistent management. As a result, it becomes difficult to train new supervisors in "best practices" since there are no standard practices at all. Reporting often occurs at different frequencies (e.g. weekly, monthly) and usually represents the "last manager's" ideas of what is needed to effectively run the operation.

- **Inconsistent Employee Feedback**—Employee discontent is created when a measurement and reporting processes are not implemented with equality across management teams. In organizations with multiple supervisory groups, it is important that employees are measured and evaluated consistently to prevent favoritism, rewarding the wrong employees, and the general dissatisfaction felt by employees when they perceive they are not being assessed fairly.

- **No Peer Reporting Tools to Pinpoint Problems**—Without transparency into employee performance, problems like high absenteeism and scheduling issues—which typically follow the "80/20 rule" where 80% of the problems stem from only 20% of employees—remain persistent. Without the proper tools to identify the 20% of workers, the general working environment can be negatively impacted with lower productivity and eroding employee satisfaction.

- **New Employee Learning Curve Varies Widely**—When managers lack the measurement and reporting tools to effectively evaluate the performance of employees,
operating costs increase, particularly in high-turnover environments such as the initial new agent training cycle (e.g. the first 90 days). Poor performers consume training expenses and lower service quality with every day on the job.

- **Too Much Management Time Spent on Administrative Tasks**—Performance management systems typically require supervisors to spend much time on administrative tasks (e.g. collecting operating information, creating and preparing reports, meetings, etc.), taking them away from employees and customers. When managers and supervisors focus too much of their time on administrative details, they lose touch with their employees as well as with those important details that drive the business. This prevents managers from responding quickly as conditions change, or responding at all.

- **Inconsistent Proficiency Among Employees**—Without the ability to identify under-performers, managers cannot reconcile inconsistent proficiency among employees of the same skill group.

**Performance Management Benefits Drive ROI**

Addressing these problems by implementing a performance management solution can yield a number of bottom-line benefits and result in a speedy return on investment. Some of the key drivers of ROI include:

- **Increasing employee productivity**—Performance management systems improve employee performance so employees can be more efficient and effective. This not only reduces staffing costs and associated overhead, but can increase customer satisfaction and improve revenues as well.

- **Increasing customer satisfaction and customer retention**—Performance management systems help customer-facing employees improve the quality of each customer interaction, enhancing the customer experience and measurably raising customer satisfaction levels. Increased customer satisfaction can directly link to increased customer retention, leading to greater lifetime customer profitability, larger customer revenue contribution, and decreased customer retention costs.

- **Enhancing and protecting revenue streams**—Performance management systems enable employees responsible for revenue generation (such as sales and contact center employees) to increase their skill levels leading to increased revenue per transaction as well as an increased number of transactions per time period.

- **Improving the process of process improvement**—Unlike other approaches, a performance management solution can measure and improve any business process—even itself. As a result, it enables a self-perpetuating "virtual cycle" whereby productivity gains, even in the process of measuring and improving business processes, can be realized and improved over time. This can lead to an exponential gain in process performance and the resulting business goals including revenue enhancement and customer satisfaction.

- **Reducing costs of employee attrition**—Using a performance management system can bolster employee confidence that they are evaluated fairly, give them transparency into how their performance is measured, provide feedback on improvement
and career path, and provide positive reinforcement of success. This increases overall employee satisfaction, leading to reduced employee attrition rates.

- **Reducing performance management workload**—Performance management systems automate tasks such as data management, performance analysis, employee feedback, and management feedback, reducing or eliminating the manual processes by which supervisors currently conduct employee performance management.

- **Institutionalize Best Practices**—Performance management systems can identify top-performing employees and pinpoint their best practices, enabling the organization to more quickly and easily disseminate these best practices to other employees throughout the organization.

- **Reducing learning curve for new hires**—A performance management system can provide new hires constant and immediate feedback, enabling them to realize performance improvement right away rather than waiting for a 30-, 60-, or 90-day evaluation period.

- **Reducing IT workload**—Performance management systems automate the collection and consolidation of data from many databases and applications, eliminating the need for IT staff to perform this work manually.

**Drawbacks with Current Approaches to Performance Management**

A number of approaches to performance management have been implemented over the years. Traditional approaches include:

- Analytics, data mining, and business intelligence software
- Manual (paper-based) objective setting, management, and feedback processes

These approaches are ad hoc, cumbersome, inconsistent, and don’t provide the benefits of a comprehensive performance management solution. Further, many are specific to particular functions within the enterprise, and none tie the objectives of individual managers and employees to the organization’s goals and objectives.

Some of the other shortfalls of analytics, data mining, and business intelligence software include:

- **Product-only focus**—Vendors typically don’t offer strategic consulting or industry-specific content designed to introduce best practices into the customer organization.

- **Limited scope**—Products are typically only accessible by business analysts and senior management, and don’t provide information relevant to the individual employee or mid-level manager to monitor progress against goals.

- **Disjointed**—Products typically don’t link company goals and objectives to individual and managerial objectives.

- **Function-specific**—Products are frequently specific to a particular "siloh" within the organization—for example Sales Force Automation focusing on Sales—but aren’t able to bring applicable information together from across the enterprise.
• **Not real time**—Many don’t provide real-time data or analysis, instead supporting weekly or even monthly reporting.

• **No feedback loop**—Products usually provide reporting and analysis capabilities only, and don’t enable managers to implement improvements directly into the system.

Likewise, the standard manual approach to setting objectives, management, and providing feedback is time-consuming and inflexible. Specific problems with this approach include:

• **Inconsistent**—it is difficult for a company to ensure consistency in its approach to management and feedback throughout the organization.

• **Inflexible**—once objectives are set at the manager and employee level, it is very difficult to change them to meet updated organizational goals based on shifting market demands.

• **Subjective**—a manual approach relies on largely subjective manager-by-manager approaches to setting objectives and measuring employee performance.

• **Lack of control**—a manual approach relies on mid-level managers to correctly and appropriately interpret organizational goals and apply them to their portion of the business.

Perhaps most importantly, none of these approaches provides a framework for continuous improvement. None is designed to measure the feedback process itself in order to continuously improve it over time.

**ADVISOR: THE BLUE PUMPKIN APPROACH TO PERFORMANCE MANAGEMENT**

Blue Pumpkin Advisor is the first comprehensive solution designed to simplify the difficult task of managing the complex set of performance management processes. The Advisor solution is based on a software application that measures, tracks, and reports individual performance to facilitate collaboration among managers and employees. Built upon this is a complete professional services solution, combining implementation services to integrate the software with enterprise data sources, along with consulting services to assist in establishing business goals and key performance indicators.

Blue Pumpkin Advisor rapidly improves the performance of people and organizations, enabling the enterprise and everyone in it to consistently meet their goals. Advisor automates and accelerates the performance management process to generate performance improvements such as reduced costs, improved quality, increased revenue, and higher productivity.

By providing a single system for establishing, measuring, and communicating progress, Advisor aligns the efforts of all functional groups and ties their personal and group objectives to corporate goals. Advisor motivates individual employees to perform better. It predicts results and pinpoints the people and business drivers responsible for success and failure, empowering management to provide stronger leadership, resolve issues, and quickly extend successes across the organization.
Business Consulting Sets the Stage for Successful Advisor Implementation

Blue Pumpkin Advisor provides a level of strategic business consulting that goes well beyond most vendors’ implementation assistance. Blue Pumpkin’s seasoned consultants, steeped in industry best practices and uniquely qualified to help companies measure the right key performance indicators to support their overall goals, work closely with the company to develop and implement a performance management plan that is tailored to fit the individual circumstances of the company.

The engagement begins with a Blue Pumpkin Performance Management Assessment. This is a three-week process in which the Blue Pumpkin Strategic Solutions Group works with the company’s management team to thoroughly inventory and evaluate the existing measurement and feedback processes, and to develop a plan to optimize them.

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**Performance Management Workflow Cycles.** Performance Management starts with setting long-term strategic goals as part of quarterly or annual cycles, and includes more frequent cycles to track results and make adjustments.

The steps implemented in the performance measurement and feedback process include:

- Collecting performance data
- Tracking results
- Generating compliance and alert messages
- Recommending improvements
- Communicating throughout the organization and taking actions accordingly

In parallel the Blue Pumpkin professional services team works with the organization on its process of establishing business goals and metrics. The steps in this process include:

- Setting strategic goals
- Identifying reporting relationships
• Identifying industry best practices
• Collecting historical performance data
• Analyzing historical performance
• Developing key performance indicators
• Mapping KPIs and metrics to goals
• Setting performance goals
• Setting values to generate alerts

The depth of business offered by Blue Pumpkin is one of the key differentiators of the Advisor solution.

Performance Management Software Rounds Out Advisor

The Blue Pumpkin performance management solution comes complete with the Blue Pumpkin Advisor performance management software application. Part of the Blue Pumpkin Workforce Optimization Suite, Advisor provides enterprise-class robustness, reliability, and scalability, making performance management best practices originally pioneered in the contact center available throughout the enterprise.

Key features of the Advisor software application include:

• **Flexible Key Performance Indicators (KPIs)**—Advisor uses the optimal KPIs chosen from hundreds of off-the-shelf and custom possibilities to best meet the organization’s and each employee’s one-of-a-kind needs. It monitors business processes to provide executives, managers, and employees the most useful information about performance and progress toward goals. KPIs measure operational execution, allowing management to understand exactly how successful each employee, each department, and the entire enterprise is at achieving corporate goals while identifying best and worst performers in the organization.

• **Personalized performance scorecards**—Each day Advisor provides executives, managers, and employees with a personalized performance Dashboard that displays results to date against corporate objectives and KPIs over any period, ensuring that everyone knows exactly how they’re doing against established metrics and is working toward achieving the same corporate goals.

• **History graphs**—Advisor graphically displays trends, assessments, and status toward goals, showing the organization where it is, where it has been, and if it is headed in the right direction.

• **Automatic trend identification**—Advisor’s Highlighter feature automatically detects and points out subtle trends early (both negative and positive), pinpointing issues to be resolved before they become problems or affect customers, and allowing new opportunities to be exploited before the competition sees them. When a KPI falls outside the accepted boundaries, it is "highlighted," at which time a notification may be automatically sent to the appropriate manager. This instant notification enables managers to take appropriate action while there is an opportunity to affect the situation, rather than waiting for a month-end report that arrives well after the situation has passed.
• **Performance communication engine**—A benchmark is a standard of performance or a point of reference that serves as the basis of understanding relative standing or performance. Benchmarking is critical to formulating a knowledge-based plan of action to achieve objectives. Internal peer benchmarking allows employees to see how they are performing against their peers in the organization. Advisor provides two tools to communicate performance-related benchmarks among managers and their direct reports, providing information to drive actions necessary to achieve the business objectives.

- **Single source for employee and customer performance data**—The larger the number of data sources integrated into the performance management solution, the richer the mix of key performance indicators that will be available to effectively measure business performance and trends. Advisor automatically extracts, transforms, and stores performance data, creating a consolidated data store from many applications and databases across the enterprise including CRM, HR, Payroll, and ACD systems.

- **Flexible timeframes**—Advisor allows people to manage an objective across whatever timeframe is most appropriate: daily, weekly, monthly, quarterly, etc.

- **KPI wizard**—Advisor’s KPI wizard allows executives to quickly modify goals and key performance indicators themselves, so they can make rapid changes in business direction to meet shifting demands of the marketplace without waiting in line for assistance from programmers.
Advisor Tailored for All Audiences

Blue Pumpkin Advisor's scorecards, graphs, and alerts are tailored to provide personalized feedback to employees at all levels of the organization. Executives can instantly see how the performance of individual departments or the organization as a whole is tracking to objectives, while employees can see how their personal performance is measuring up and the areas they need to focus on to achieve their goals.

Agent Scorecards. Scorecards for individual agents show metrics against established KPIs, including quick-reference indicators on whether performance is above or below targets (smiley faces), and what the recent trend is (arrows).

Management Scorecards. Scorecards for senior management can show roll-ups of key performance measurements for a particular team, site, or group of sites, with clear indications of performance and trends against established targets.
Advisor Advantages

In contrast to alternative approaches, Blue Pumpkin Advisor enables companies to:

- Automate the process of performance management—reducing the management workload in performance management, tracking against objective measures, and ensuring consistency of measurement across the organization
- Tie manager and employee goals and metrics to overall organizational objectives
- Combine strategic consulting, change management, and infusion of best practices with the performance management software application
- Measure the performance of any process—even itself—enabling organizations to benefit from a "virtuous cycle" of exponential performance improvement
- Flexibly enable executives to update corporate goals and objectives and modify the objectives as appropriate throughout the organization
- Enable managers to implement improvements directly into the system
- Provide real-time data, analysis, and feedback
- Use Blue Pumpkin Fusion—a core module in the Blue Pumpkin Workforce Optimization Suite—to integrate to any data source (e.g. ACD, Quality Monitoring, CRM, spread-sheets, and desktop databases)
- Use Advisor’s flexible and highly configurable user interface to personalize the implementation to their situation, including customizing setup, KPIs, employee profiles, and Scorecards
- Save time, money, and risk—Giga Research estimates "buy" saves between 50-75% of implementation and 40-60% on software costs vs. "build"
- Consistently provide personalized performance feedback to all organizational levels
- Consolidate employee and customer information from many systems to view all performance information in one place
- Enable performance communications among managers and employees to drive changes necessary to achieve business goals

CONCLUSION

Performance management systems are used by businesses to evaluate how employees, organizations, and the enterprise as a whole are performing relative to key business drivers and goals. By enabling employees to be more efficient and effective, performance management systems can drive literally millions of dollars in bottom-line value by enhancing and protecting the business’ revenue stream, improving employee satisfaction, and reducing customer churn.

Blue Pumpkin Advisor represents a significant advance in performance management. For the first time it provides an enterprise-wide approach to performance management, leveraging
best practices and applying them across the enterprise. By combining the Advisor performance management software application with Blue Pumpkin Services, Blue Pumpkin provides a comprehensive, tailored solution designed to optimize organizational performance. And unlike alternative approaches, Advisor provides a consistent, standardized, flexible approach to performance management.

Additional information on how Blue Pumpkin Advisor can help realize these benefits can be obtained by contacting Blue Pumpkin at www.bluepumpkin.com.

Further Reading


**ABOUT BLUE PUMPKIN SOFTWARE**

Blue Pumpkin provides workforce optimization solutions that align your people, skills, and performance with your business goals to rapidly achieve competitive advantage and increased profits.

Blue Pumpkin’s workforce optimization software and strategic consulting services are used by more than 900 organizations around the world.

**About the Author**

KEN FORBES joined Blue Pumpkin in 2001 and is current Chief Technology Officer. Mr. Forbes has over twenty years experience in designing and implementing solutions to complex business problems and directing leading-edge technology teams.

Prior to joining Blue Pumpkin, Mr. Forbes was a founder, Executive Vice President, and Chief Technology Officer of Hiho Technologies, offering a Web-architected solution that used the Internet, telephone, and emerging wireless networks to deliver workplace management solutions. He was the principal product architect of the company’s patented TimeVisualizer® technology, as well as award-winning workforce management products, PeopleScheduler and WorkFORCE.

Prior to Hiho Technologies, Mr. Forbes was vice president of worldwide engineering at NetManage and CEO/Board Member at TouchStone Software, both NASDAQ-traded companies. As president and CEO of MobileDigital Corporation, he led the company in pioneering connectivity products for the wireless data communications industry. Other accomplishments include development of transportation systems at SuperShuttle International and developing advanced dispatch automation systems for transportation operations for Trans Tech Services, a company Mr. Forbes co-founded in 1983.

Mr. Forbes earned his BS in Management Science and his MBA from the University of West Florida.