



## 2020 Year-End Performance Review

Review Period 1/1/2020 - 12/31/2020



### REVIEWER

Brian Famous (Manager), Tracy Basey (Manager - Co-Planner)



**Elizabeth Wichman**

Events Experiential Marketing  
Job Code

Performance Goals

### 2020 Individual Contributor How Goal

Be a role model of TIAA's Values-Based Leadership Model behaviors. Work inclusively and collaboratively to enable us to Win with Purpose Together. Specific behaviors include:

QUALITY

- Provide Exceptional Service
- Establish Strategic Priorities
- Drive Continuous Improvement

PEOPLE

- Communicate Openly
- Foster Collaboration
- Develop Self & Others

CHARACTER

- Build Trust
- Take Ownership
- Make Sound Decisions

Start Date	Target Date	Status
1/1/2020	12/31/2020	Completed



Comments

**Elizabeth Wichman (Self):**  
This goal was supposed to be cancelled since it is global behavior for the tea,.

**Tracy Basey (Manager - Co-Planner):**  
Shawn clearly has proven to be an *exceptional* individual contributor with many triumphs despite the vast amount of TIAA Marketing organizational changes in centralizing resources and/or areas across three entities this year. She modeled the TIAA values in working inclusively and collaboratively with many business partners that valued her expertise.

### Evaluate processes, develop or maintain Job Aid documentation, and promote continuous improvement ideas within Print Channel/Industry to seek innovation of services and achieve execution excellence by end of 3Q

- Develop NEW SERVICES Job Aids **LANGUAGE TRANSLATION Job Aid** on Sharepoint with list of vendors and create online order form until Aprimo updates with a resource request by June 1(3Q)
- Update the **IAS Workflow Job Aid** on Sharepoint with defined project scopes, data processing for each line, standard

stocks, IAS Brand Guidelines, and PO accruals for Welcome Kits by July 1(3Q)

- Create a **BANK Job Aid** on Sharepoint with defined project scopes, data processing rules, standard stocks, and job specific behaviors by August 1(3Q)
- Create an **ePRO INVOICE Job Aid** for submission of invoices by print team not covered by PO blankets across vendors and post on SharePoint by Sept 1(3Q)
- Create universal performance team metrics and process on combined Sharepoint. Refine Print Team Budgetary Metrics of 35711 through possible full automation with HUB integration. (4Q)

#### Start Date

1/1/2020

#### Target Date

12/31/2020

#### Status

Completed

#### Progress

 100%

#### Comments

##### Elizabeth Wichman (Self):

At the beginning of the year, it was my expectation to create a job aid for various lines of business I was working, specifically LANGUAGE TRANSLATION, IAS WEALTH MANAGEMENT, TIAA BANK and NON-BLANKET INVOICE PROCESSING. Because of the pandemic, organizational restructuring and the natural course of process change within each business, these specific job aids became irrelevant or unnecessary. My focus shifted instead to handshakes with business partnerships, process improvements, and realignment of resources required by my workload.

Late last year, the SLRB Team dissolved and an internal translation review board no longer existed at the same time requests for Institutional and Enterprise translation requests reduced from thirty five requests annually to ten. Nevertheless, I remained a source for requests and provided certificates of authenticity for compliance requirements. In addition, the Spanish website for TIAA was retired and I suggested we move this service to the Nuveen team, which manages a higher volume of work.

An interesting development in my workload became the need for *trigger campaign support* for IAS work. Because of funding and the VSP program, IAS concentrated on aligning new business with newly assigned advisors and I assisted in the development and deployment of a weekly, onboarding package that includes personalized high-end marketing pieces placed in inventory. In addition, I provide weekly reports back to the business owners to confirm actual deployment and inventory levels to target replenishment requirements. The campaign is so successful they updated the design and extended the campaign into 2021.

##### So what did I accomplish this year?

- Managed over **150 Enterprise and Retail projects** working with various business partners
- Mailed over **10.5 million DM packages** and placed **5 million collateral** pieces into inventory
- Managed the **print spend of \$1.2 million** and **\$1.25 million in postage** without PO blankets
- Assigned to pilot campaigns for the **1:1 Journey Experience**
- Shepherded the **migration communication of new IAS Advisors** for 120,000 participants across 14 different packages in weekly mailings
- Actively engaged in the onboarding experience for two main DM vendors to **eSettlements**
- Delivered 2020 **Privacy Notice** inventory and Adhoc DM campaigns across business lines
- Supported **Blanket PO accruals** across the team until the AP change of invoice management changed the workflow

- Leveraged relationships in Purchasing to facilitate the business requestor experience in **PO requests and vendor aging**
- Leveraged technology for workarounds in **Mobius** for a special ad-hoc campaign
- Built business critical relationships for the **Institutional PLE campaign** during the VSP transition
- Recognized as a **Cares Act Hero** in TIAA NEWS May 2020

This year is exceptional for all the wrong reasons but, with the exciting transition of Marketing and new forward thinking business requirements, I am excited to remain a strong team resource in Operations.

#### **Tracy Basey (Manager - Co-Planner):**

This year has been the most eventful year of change from all perspectives. In losing many long time colleagues to VSP, the unforgettable historic Covid-19 Pandemic, and the unrest of our nation, Shawn stayed focused on her assigned efforts and opportunities. She remained eager to seek interest in top priorities, managed the RETAIL business inclusively, and masterfully took on the challenges to solve for a ton of NEW technology introduced and process shifts into the Print DM Channel.

Historically, the Print Channel collectively and collaboratively, has remained very value-added SME resources in guiding many requestors and suppliers, through the onboard navigation of business partner's implemented tools such as **Adobe 1-1 Journey Experience**, and **eSettlement** learnings.

While the business restructured drastically for IAS, transitions fluctuated for the BLANKET PO process through the year, and the reduced volume (11) of Spanish translations dismantled, a service remained. Shawn felt the Job Aides may no longer be a priority but there is a business continuity concern that maps to our Standard Operating Procedure (SOP) that remains very relevant. The center and success of operations must always ensure that we maintain documented processes and ensure our archives remain compliant as change will remain constant in our new centralized culture.

As Shawn solely handled many unique services such as Retail, Privacy, and translations within a lean Operations model, TIAA's culture is rich in empowering professionals to take advantage of career mobility. Shawn, in early December, took full advantage of opportunity, and has departed the team. Her departure underscores the importance of moving away from a 1-1 SME to a more cross-functional team to seamlessly transition knowledge and the need for a Leadership phased plan to grow teams continually with opportunities.

I am grateful, as a strong resource, she remains in our area of the organization, and look forward to seeing her thrive in her new Seismic role. I am laterally excited to work and build partnerships to centralize Enterprise services she supported such as Privacy and ultimately the Spanish translations, so we can scale resources in our forward modernized mission.

Her dedication is clearly shown in her cited accomplishments and exceptional execution.

### **Support, test, and adopt the roll out of the new capabilities to enable enhanced cross-channel delivery through Messaging Gateway/ACM by Q4.**

- Connectivity testing to external print vendors –Phase 1, Q2(FTP)
- Ensure external vendor validations for data possibly in Phase 4, Q4 of pass back through the tool after data manipulation

**Start Date**  
1/1/2020

**Target Date**  
12/31/2020

**Status**  
Completed

## Progress

100%

## Comments

**Elizabeth Wichman (Self):**

The technology handshake is being handled exclusively by management now we realize DM will not be active on the actual portal. It is a data pass through only.

**Tracy Basey (Manager - Co-Planner):**

The Adobe Journey 1-1 Experience was been nothing short of complex with an unclear expectation of the DM Channel role and Supplier integration. However, on a positive note, there was definitely a silver lining of learning gained in authentication and encryption key processes to operationalize DM with returned disposition file in partnership with IT, Adobe, and Suppliers.

Shawn's Retail Campaign business strategists were learning 1-1 Journey builds with a high need for email deployment as Adobe was enabling DM suppliers to laterally be introduced late in the implementation. Therefore, Shawn had to reroute execution due to the lack of readiness and learning skills of our partner's technology dependencies. Given the late clarity, it left a disappointment in the technology opportunity and excitement to reskill for the tool.

## Overall Performance

Please comment on overall performance in the space below.

## Comments

**Elizabeth Wichman (Self):**

Working as one member on a fantastic team of professionals, I utilize my superior project management skills and vendor relationship building strategies to promote change in marketing communications with active engagement in technology and process improvements.

I am sensitive towards cost efficiencies in direct mail campaigns and collateral and remain focused on industry trends and innovations. I am highly effective managing complex campaigns across several business areas. I am a forward-thinking marketing professional always in search of high impact results with an eye towards business critical priorities. I look forward to expanding the capabilities of the team in 2021!

**Tracy Basey (Manager - Co-Planner):**

**Shawn has such a natural knack for balancing her skills, and relationships with an unwavering sense of process discipline. She always stayed centered on industry trends and innovations for highly-impacted results.**

**It is my utmost privilege to have extended an opportunity to have Shawn on my team over the past 9+ years as very valued, effective, committed, and trusted forward thinking direct report. She is a respected as a professional, I am elated to see her thrive in a NEW Seismic role towards a brighter future in management of technology in Publishing**

joining Brian Famous and Team with hope our paths cross again in the near future.

Thank you Shawn for ALL for your contributions, valued service, dedication, and hard work over the years. I am so grateful to have had such a trail blazer on the Team. I sincerely wish you all the very best in your future endeavors on the Publishing Team in building a more cohesive modernized operations model to scale execution.

## What Rating

### Rating Scale

Rating	Description
Unacceptable	Performance is significantly lower than expectations
Inconsistent	Does not consistently meet expectations
Achieves	Performance achieves expectations
Exceeds	Performance meets and often exceed expectations
Exceptional	Performance exceeds expectations in all areas

### Select the 2020 “What” (Results) Performance Rating

Reviewer	Rating
Brian Famous (Manager)	Achieves

## How Rating

### Rating Scale

Rating	Description
Unacceptable	Performance is significantly lower than expectations
Inconsistent	Does not consistently meet expectations
Achieves	Performance achieves expectations
Exceeds	Performance meets and often exceed expectations
Exceptional	Performance exceeds expectations in all areas

### Select the 2020 “How” (Behaviors) Performance Rating

Reviewer	Rating
Brian Famous (Manager)	Exceeds