

William Namayi

Goal

Deliver on our promise to our customers and stakeholders to provide an exceptional customer service experience utilizing our expertise and acting with honesty & integrity with each interaction.

Target completion date	Status
12/31/2024	In Progress

Key Measures

- Operational processes are completed within published or agreed upon SLAs (97%+), with a high level of accuracy (97%+), and in accordance with any and all published attestation, compliance, control, regulatory and standard operating procedures or guidelines (99%+).
- Intranet, Confluence, Standard Operating Procedures, TSD knowledge articles are reviewed for accuracy and updated as assigned or as assigned processes change.
- Customer feedback is requested and action is taken in order to address any opportunistic feedback to improve customer experience and in specific areas that can be measured all documented goals are achieved. TSD Ticket Customer Satisfaction Ratings average > 4.5 and > 70% favorable VOC survey analytics.

Comments

- William Namayi | March 22, 2024 at 11:45 AM

I have been working on some new State Auto tasks, that have been going out of SLA as I get up to speed on them. My goal is to get up to speed and work them efficiently. Additionally, I have yet to create standard work for these tasks as I am still in the process of developing knowledge on them.

I have received a couple of 5 star ratings on TSD as I have been helping our internal stakeholders.

- Elaine Howard | March 25, 2024 at 4:49 PM

Will came back from paternity leave and jumped right into learning and covering work again as two of our team members were departing. While some of the "newly" assigned tasks are going out of SLA those in which Will was training on already within the ERS workspace have SLAs of 100% currently.

- William Namayi | May 20, 2024 at 1:43 PM

Continuing to work through State Auto tasks and cross training to gain better understanding on tasks, while maintaining 97% SLA on customer inquiries.

- William Namayi | September 23, 2024 at 8:59 PM
 - Served over 45 different counterparts as well as escalations in TSD while maintaining 96% SLA with a few escalated issues that were out of SLA & 5 satisfaction rating.
 - There are several processes that I need to update SOP's for and have not gotten the chance to, my goal is to complete those before 9/30.

Goal

Lead operational excellence with a commitment to cross-functional collaboration to identify, design, and implement process improvements/system changes.

Target completion date	Status
12/31/2024	In Progress

Key Measures

- Complete all ad hoc testing/projects assigned as we are engaged to assist with implementations led by S&C with expertise and within agreed upon timelines (Examples: SA AP conversion, SAP upgrades, SAP new releases, myExpense rollouts/upgrades, other).
- Improve quality of work completed by EXL team and other vendors with regular feedback to manager assisting in keeping relationships in a 'green' state.
- Collaborate with key ERS partners:
 - 1) In partnership with FD&I and Talent Service reduce the impact of MOCC to Liberty.
 - 2) In partnership with Corporate Travel improve customer service/employee experience.

Comments

- Elaine Howard | March 25, 2024 at 4:51 PM

Will is just coming back from paternity leave so has yet to jump into misc. projects! He does contribute regularly to supporting our EXL partnership though providing feedback, responding to FAQ trackers, bringing items to our office hours call, and will be supporting procedure review.

- William Namayi | May 20, 2024 at 2:20 PM

1. Partnering with the ET&S Ops Excellence team to provide expense spend analysis from myExpense to highlight areas of opportunity in corporate credit card spend.
 2. Partnered with to created 4 recurring custom spend reports for SBU's to aid in budgeting as well as provided 10 other custom reports to different stakeholders.
- William Namayi | July 25, 2024 at 11:34 AM

Collaborated with David Hill from the Procurement Analytics team, sharing knowledge and experience on how to build out JIRA analytics for operational teams.

- William Namayi | September 23, 2024 at 8:50 PM
 - Partnered with Elaine to develop a framework for performing appropriate audits on Misuse of Corporate Cards.
 - Regular review of SOP's used by EXL partners and providing support to escalated production issues.

Goal

Lead Expense Efficiencies

Target completion date	Status
12/31/2024	In Progress

Key Measures

- Improve operational efficiency by 100 hours by implementing process improvements, identifying non-value-added work, transitioning work to vendors, and utilizing new technologies, etc.
- Improve daily management of T&E card program to increase rebate (as beneficial) and reduce expenses:
 - 1) Average Days to Pay between 22 and 25 days.
 - 2) % of Compliant Spend should be greater than 85%.
 - 3) Card Adoption % target is 93% or higher.
 - 4) Outstanding Transactions > 60 days less than 3%
- Compile monthly TSD and Survey Analytics metrics for Treasury. Highlight areas of strength, areas of opportunity and share insights monthly across Treasury.

Comments

- William Namayi | March 22, 2024 at 12:02 PM
 1. I am in the process of developing an automated way to reconcile accounts with personal payments. This process is 75% done with the goal of being done early Q2. I will evaluate full impact upon completion, but I project saving about 25hrs performing the Personal Payment audit.

- 2. The Card program metrics are looking great so far! Avg days to Pay ~18, % of compliant spend ~89%, card adoption ~ 96%.
- 3. I will work on owning the operational analytics being sent out to the treasury team on a monthly basis.
- Elaine Howard | March 25, 2024 at 4:51 PM

Great start for just a couple of weeks, excited to see impact in this space as Will continues to grow his skill set in PowerBI and Python.

- William Namayi | May 23, 2024 at 1:27 AM
 1. In the collaboration stage for the Personal Payment Audit, having built out a model that allows us to reconcile bank and expense reports.
 2. Card program metrics: Avg days to Pay ~ 16.5, % of compliant spend ~ 89%, card adoption ~ 95%
 3. I have prepared reports that showed trend of operational metrics and presented in the Global Treasury Pulse call.
 - William Namayi | September 23, 2024 at 9:02 PM
 - Card program metrics: Avg days to pay - 16.8, Card Adoption ~ 95% Compliant Spend - 97%
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Growth Opportunity

(2023) Become SME in SAP to provide guidance to my teammates as we transition into One GL

Development Experiences

- Familiarize myself with SAP through taking some courses on MCDC.

Status: Completed

- Hosting learning & demo sessions for my team

Status: Completed

- Perform User Acceptance Testing for BAM & ERS workstreams.

Status: Completed

- Identify which reports & processes will need to change and update SOP's

Status: Completed

Growth Opportunity

(2023) Optimize the corporate credit card program management by providing actionable, decision-making insights.

Development Experiences

- Develop Health Dashboard on Power BI to provide a framework for monitoring and or proactively gather real time insights on Corporate Credit Card usage.
Status: Completed
 - Discover ways to leverage Power Automate to streamline some of the manual tasks involved in the corporate credit card program management.
Status: Completed
 - Develop my Power Automate skills by completing a Power Automate course
Status: Completed
- ## Growth Opportunity
- (2023) Develop foundational understanding in Python programming to perform complex data analysis and leverage machine learning and AI in decision making.**

Development Experiences

- Complete Fundamentals of Machine Learning for Supply Chain on Coursera
Status: Completed
- Complete Demand Forecasting Using Time Series on Coursera
Status: Completed
- Complete Advanced AI Techniques for the Supply Chain on Coursera
Status: Completed
- Complete Capstone Project: Predicting Safety Stock on Coursera
Status: Completed

Growth Opportunity

Be involved in activities outside of my current team and treasury organization to expand my network

Development Experiences

- Attend 2 or more ERG events to try on different perspectives to be more diverse in thinking and interactions
Target completion date: 12/31/2025
- Take part in Serve with Liberty volunteering in the spring
Status: Completed

- Attend Plano Discovery Day in February.

Status: Completed

Comments

- William Namayi | April 2, 2025 at 7:56 PM

Engagement with Plano Actuarial and Analysts Community

- Participated in Plano Discovery Day, expanding professional network.
- Connected with the Plano Actuarial and Analysts community.
- Attended two lunch and learn sessions on state insurance processes.
- Gained knowledge in ratemaking and renewing lines of business (workers comp) across states.
- Enhanced understanding of industry practices and broadened expertise.

- William Namayi | July 28, 2025 at 2:18 PM

I participated in Serve with Liberty in May, engaging with the Plano Actuaries and Analysts group, which helped me expand my professional network and continue building valuable connections outside my immediate team.

Growth Opportunity

Coach, mentor and share technical expertise with Global Treasury teammates.

Development Experiences

- Facilitate weekly Power BI Knowledge sharing sessions.

Target completion date: 12/31/2025

Comments

- William Namayi | March 21, 2025 at 5:30 PM

Development of Unclaimed Property Dashboard

- Led weekly Power BI working sessions for dashboard development.
- Delivered a minimum viable product for the Unclaimed Property Dashboard.
- Visualized counts and amounts of unclaimed property due for strategic planning.
- Identified optimization opportunities for processes and workload management.
- Received spotlight recognition from Karen for impactful contribution

- William Namayi | July 28, 2025 at 1:21 PM

Regarding my growth opportunities this quarter, UI/UX design learning has been on hold without practical application yet due to shifting priorities and new developments. Instead, I dedicated about 5 hours during Q2 to deepening my knowledge of Power BI data modeling best practices. This led to the realization that several of my existing models were inconsistent due to how they were originally built.

I have involved Sean and Bobbi in our Power BI calls and am actively sharing these improved model-building approaches with the Power BI knowledge-sharing group as well as mentoring our intern. Revamping key models such as the Corporate Credit Card KPI dashboard and the Expense Spend model will be a focus in Q3 and Q4. Looking ahead, I plan to continue improving my Power BI models, apply UI/UX design principles when feasible, and maintain active coaching and mentoring roles while strengthening external relationships.