



Cruz, Ricardo S.

2024 INDG Year-End Performance Appraisal

Content Production Lead (INDG)

Organization: INDG Bloomberg Tax (Sally Baird
(007220))

Manager: Sally Baird (007220)

Location: Arlington - 1801 S Bell (INDG)

Evaluated By: Sally Baird (007220)

01/01/2024 - 12/31/2024

Overall

Manager Overall Evaluation

Calculated Rating: 3.02

Rating: 3.00 Achieves

Comment: Going into 2025, as we combine the BLAW and BTAX Content Production teams, I expect that there will be numerous opportunities to bring your vendor expertise (and your persistence!) to bear as we work together to ensure that our combined team is operating at optimum efficiency.

I look forward to working with you on this.

Employee Overall Evaluation

Calculated Rating: 3.5

Rating: 3.50 Achieves

Comment: This year was very productive in transitioning some of TPQA tasks to vendors and getting to know Syracuse Team members and help them familiarized with Arlington workflows.

Goals

1. Operations

Provide vendor support and leadership, as needed, to Content Operations and the Tax business unit, in particular through facilitating and supporting integration efforts of the Arlington and Syracuse teams.

- Independently organize, manage, and assign work and projects in Vendor swim lane; proactively provide training and monitor swim lane deliverables.
- Ensure vendors have necessary tools, access, and background knowledge to effectively and efficiently perform assigned tasks, including Jira dashboards, project documentation, training, etc.
- Support integration of Arlington and Syracuse teams by identifying opportunities for workflow improvement and redesign, involvement of other team members, providing training as necessary.
- Deepen knowledge and expertise around "TaxTier2" triage, particularly related to monitoring IRS workflows and troubleshooting complex problems in BDMS, and actively seeking out learning opportunities (TaxTier2 Knowledge Transfer).
- Coordinate with other swim lane leads to collaboratively solve Content Operations workflow bottlenecks, and implement appropriate, creative solutions.
- Improve technical skills and demonstrate a high level of proficiency in at least three of the following areas:
 - BDMS - search BDMS, troubleshoot publishing problems, coordinate with GD as needed to identify source of ingestion problems.
 - Excel (creating and using basic formulas, using excel for data cleanup, applying filters)
 - Oxygen Desktop – using xslt for large-scale data remediation.
 - Word (basic macros, advanced searching, creating styles and templates)
 - Anthology (working in Beta, create new pages, troubleshooting)
- Clearly convey metrics, benchmarks, project status, and other key facts to team, stakeholders, and TAX leadership (e.g., Vendor budget-to-actual progress & cost to date)

- Support consolidation of disparate portfolio production workflows, through activities such as creating Portfolio dashboard showing content as it moves through initial acquisition, through all production steps to release and printing.

Due Date: 12/31/2024 Status: Ongoing Completion Date:

Weight: 35

Manager Evaluation

Rating: 3.00 Achieves

Employee Evaluation

Rating: 3.50 Achieves

2. Finance

Support team priorities around measuring, monitoring team resource allocation, redesign workflows to maximize financial return/savings.

- Strategically manage vendor relationships, building necessary knowledge and insights to create maximum return for INDG. This includes:
 - Establish Vendor metrics to monitor ongoing efficiency and productivity and to provide standard for estimating anticipated vendor hours.
 - Provide guidance, direction, and project management in expansion of breadth of Innodata project support to include INDG data conversion and tagging tasks
- Identify and implement redesign/elimination of workflows in the Vendor swim lane, using Jira metrics to document savings.
- Provide project support and guidance to Operations RD and automation initiatives.
- Work with team members to transition current vendor workflows to Jira ensure maximum efficiencies derived of additional vendor access and be able to document net savings.
- Ensure Jira tickets, related documentation, and time recorded are current, complete, and accurate.
- Redesign Vendor Dashboard to reflect current costs against budget figures.

Due Date: 12/31/2024 Status: Ongoing Completion Date:

Weight: 25

Manager Evaluation

Rating: 2.50 Exceeds Expectations

Employee Evaluation

Rating: 3.50 Achieves

3. Product/Services

Provide support and leadership, where possible, to identify and implement innovative workflow solutions to move content to product more quickly and transition workflows currently with Tax Product and Analysis & Content teams to TPQA.

- Provide vendor support and leadership to C&A team, providing regular reports on vendor spending, providing assessment and scoping for special projects and initiatives, and in the implementation of new and redesigned vendor workflows.
- Work collaboratively with individuals and teams in Content Operations, Global Data, and across Tax business unit to provide support, direction, and troubleshooting expertise regarding INDG publishing systems and workflows
- Build background knowledge and expertise around "TaxTier2" triage, particularly related to monitoring IRS workflows and taking necessary actions in BDMS to quickly remedy complex problems.

Due Date: 12/31/2024 Status: Ongoing Completion Date:

Weight: 25

Manager Evaluation

Employee Evaluation

Rating: 3.25 Achieves

Rating: 3.50 Achieves

4. Communication

Description: Build communication skills and tools which effectively and succinctly convey your own and team's work.

- Be clear and concise in communicating your message as Vendor lead, both inside and beyond the Content Operations and the Tax business unit, taking into account audience and brevity of message.
- Facilitate opportunities for other team members to build their communication and leadership skills, support team-building (e.g., Freestyle Friday hosting)
- Provide leadership as team develops and communicates Content Operations mission.

Due Date: 12/31/2024

Status: Ongoing

Completion Date:

Weight: 15

Manager Evaluation

Rating: 3.50 Achieves

Employee Evaluation

Rating: 3.50 Achieves

Section Summary

Manager Evaluation

Calculated Rating: 3.01

Rating: 3.00 Achieves

Comment: You are the most versatile and adept member of this team, with the trust and deep respect of your co-workers and other leaders with whom you work. Given your deep knowledge, expertise, and ingenuity regarding the publishing system, you are the go-to person on our team for anything requiring creative thinking and innovative solutions.

You are always willing to jump in and lead when the need arises. You did this many times during 2024, including for Formula Illustrated images, transitioning headshots to analysts, moving IRS Chief Counsel Directory to bot collection, IRS source content monitoring, and several aspects of the print portfolio replacement workflow.

I also want to note my particular appreciation for the focus and persistence you bring to everything you tackle. During 2024, you brought this focus and persistence to a key team objective – i.e., maximizing utilization of our available vendor resources.

Over the last 4-5 years, our team has managed our increasing work volume and our reduced headcount by leveraging vendor resources for data conversion and content

Employee Evaluation

Calculated Rating: 3.5

Rating: 3.50 Achieves

Comment: 2024 was a very productive year for me as I was involved in numerous projects transitioning workflows to Vendors which freed up time for TPQA staff to work on more important tasks.

Regarding Goal #1 Operations

- Coordinated with Engineering/IT in granting INDG system access to Vendor employees to ensure they have the required tools to perform their assigned tasks
- Initiated and coordinated transition of TPQA workflows (PRTN, Prop. Reg, Leg. History, VAT/GTG, Portfolio Exports, Portfolio Obsolete Cites to Vendors including creating documentations and training of Vendor Personnel.
- Created Consolidated Portfolio Dashboard showing content as it moves through all production steps, release, and printing
- Created Vendor Dashboard (Innodata) to facilitate project monitoring
- Supported Arlington and Syracuse team integration by getting STF members involved in TPQA workflows.

updating. Vendor resources are significantly less expensive than full-time INDG resources, and utilizing vendors also ensures that work is done faster, by avoiding internal backlogs. Consequently, our team resources increasingly manage vendor work rather than doing the work themselves.

Our 2024 objective was to ensure that every available vendor resource was fully utilized in a manner so as to deliver maximum benefit to INDG.

The first task you tackled was breaking “*Maximizing utilization of available vendor resources*” into tangible objectives which the team could articulate, pursue, and – ultimately – measure in regard to the two vendors with whom we work (Infocon and Innodata). You did that by organizing around key objectives:

1. Expanding capacity by:

- Extending breadth of tasks which vendors handle, and
- Training Innodata to handle BTAX tasks, ending their singular focus on Forms Workflow, and
- Establishing internal mechanisms and practices by which BTAX tasks assigned to Innodata are balanced based upon Forms volume.

2. Increasing efficiency by identifying vendor workflows with highest hours, implemented targeted solutions on vendor side, and reduced workflow hours by 30%.

3. Creating greater visibility into work by:

- Leading implementation of standard practices by both staff and vendors to capture information in Jira tickets, and
- Designing and implementing Jira and Confluence dashboards for both staff and vendors.

3. Exploring AI- and/or automated solutions for assessing vendor-outsourced tasks.

4. Establishing initial benchmarks to monitor and track vendor quality

The detail you include with your narrative details how you turned these objectives into tangible deliverables, including:

- Researched, tested, and came upon suitable dimensions and attributes for incorporating Formula Illustrated images in Portfolios to show correct aspect ratio in BTAX.
- Conveyed Vendor budget to actual cost to date to team/stake holders through periodical status reports
- Participated in summer projects which involves improving Vendor Workflows, transitioning new work to Vendor (Innodata) and improving Vendor oversight.
- Collaborated with other TPQA team members in monitoring IRS Workflows and troubleshooting Tax Tier 2 problems
- Acquired new skills in Portfolio Print Production Workflow (Compose PDFs, Portfolio Exports)
- Received training and assumed responsibility of parts of sending Portfolio to Printer workflow (Creating PO, Uploading files to Gash site, Pull Mailing List from SAP)
- Prepared documentation and shifted headshot image processing from TPQA to Analyst

Goal #2 Finance

- Provided project Support and Guidance in conducting POCs and transitioning TPQA tasks (Obsolete Cites, Prop Regs) to vendors to ensure future incurred costs will be within acceptable limits
- Worked jointly with other TPQA team members in modifying Vendor workflows (Infocon Portfolio Portfolio & PRTN processing) to improve efficiency and reduce billable hours.
- Currently working on establishing Vendor Metrics for estimating anticipated vendor hours.

Goal #3 Product/Services

- Assisted and Coordinated with Engineering in eliminating obsolete Drives, revising email gateway, creating queues and tools in BWIP
- Collaborated with other TPQA team members in monitoring IRS Workflows and troubleshooting Tax Tier 2 problems
- Initiated and worked jointly with Global data in the automation of IRS Chief Counsel Directory

- Innodata now handling non-Forms work – ensuring that Innodata resources are fully utilized even during Forms offpeak season (Mar-Oct). The BLP contract for Forms Workflow support is set price for 10 available resources. Given Forms Workflow fluctuation, these Innodata resources are not always fully utilized. Thus, leveraging these resources for non-Forms tasks creates no additional cost to Tax or INDG.
 - 20% workflow efficiency realized in targeted Infocon workflows (PRTN updating).
 - Freed Infocon resources (because work shifted to Innodata) being directed to new higher level tasks (i.e., obsolete cites).
 - Both vendors being able to monitor incoming/upcoming work via dashboards.
 - Ongoing monitoring of vendor hours, and providing timely reporting of vendor spend.
- Provided reports/assessment on Vendor spending, appraisal on New/Special Projects and revised workflows.

Even when an objective is not met (i.e., AI or automated solutions for assessing vendor tasks), important insight and knowledge is gained. First, you were dogged in pursuing Engineering resources to investigate whether an AI solution might be able to assess and "grade" the level of difficulty of content updating tasks before sending to vendor (thus providing means by which to estimate hours required to perform the work). You worked with others to quantify and provide file samples for an initial AI proposal, and by working closely with the engineer, you learned about how an AI solution would work. You did not give up after the first decline, pursuing with another AI team. Finally, after receiving the second decline, you still pursued whether there were solutions we might pursue within our team by running an XSLT script over the Word redline file to count number of changes. Your persistence was commendable and appreciated. We will continue to pursue options in this regard and look forward to your continued leadership in finding those answers.

As 2024 comes to a close, your work and leadership has ensured that our vendors are handling more types of work, they are handling it more efficiently, and with a higher level of visibility. Importantly as well, you have put in place practices and tools to ensure this work continues and that it is effectively monitored.

Bloomberg INDG Values

Innovate (INDG)

Thinks creatively about problems, proactively develops solutions before being asked, and takes calculated risks to move the business forward. Spots gaps and seizes opportunities.

Manager Evaluation

Rating: **2.75 Exceeds Expectations**

Employee Evaluation

Rating: **3.50 Achieves**

Collaborate (INDG)

Builds trust and a deep network and knows who to go to in order to get things done, timely and efficiently.

Manager Evaluation

Rating: **2.50 Exceeds Expectations**

Employee Evaluation

Rating: **3.50 Achieves**

Know Your Customer (INDG)

Anticipates customer/stakeholder needs, while building value and long-lasting relationships.

Manager Evaluation

Rating: **3.50 Achieves**

Employee Evaluation

Rating: **3.50 Achieves**

Do The Right Thing (INDG)

Acts with integrity; understands, follows, and practices Bloomberg INDG's code of conduct, principles, policies, and procedures; appropriately represents Bloomberg INDG both internally and externally.

Manager Evaluation

Rating: **3.00 Achieves**

Employee Evaluation

Rating: **3.50 Achieves**

Foster Belonging (INDG)

Creates, or contributes to, an inclusive environment that leverages diversity in all its facets: identity, experience and perspective.

Manager Evaluation

Rating: **3.50 Achieves**

Employee Evaluation

Rating: **3.50 Achieves**

Section Summary

Manager Evaluation

Calculated Rating: **3.05**
Rating: **3.00 Achieves**

Comment: Ricky is a role model in terms of modelling and embodying INDG values.

Employee Evaluation

Calculated Rating: **3.5**
Rating: **3.50 Achieves**

Comment: I try my best to find alternative ways in performing difficult and time consuming tasks in within and outside our business unit to enable myself and other Team members to work on more important projects and also for the company to save on production costs.