

REGISTER
BEFORE
April 8th &
SAVE
\$250

Call Center IQ is proud to present the **6th** Annual

CALL CENTER WEEK 2005

The Venetian Resort and Casino
Las Vegas, NV



Four-Day Event

- June 27, 2005 – Pre-Conference Workshops
- June 28-29, 2005 – Two Days of General Conference Sessions
- June 29-30, 2005 – Site Tours and Post-Conference Workshops

Five Reasons Why Call Center Week 2005 is the Must Attend Event for You:

- 1 Call Center Excellence Awards** to be presented at the awards luncheon on Day Two of the conference. These prestigious awards will be presented in three categories: Best Use of Technology, Best in Class Call Center and Call Center Leader of the Year. Apply today and be recognized among industry leaders everywhere.
- 2** This event will include **30 brand new in-depth case-studies** (including 11 Fortune 100 and 6 Fortune 500), each specifically geared to fit into one of three tracks: People, Measurement and Tools & Strategies.
- 3** Choose from **14 Interactive Workshops**, providing an opportunity for all attendees to tailor their learning to fit their specific challenges. 35 - 50% of discussion is led by the attendees ensuring their challenges are discussed in full.
- 4** Go to one of **two exciting Site Tours**. Visit William-Sonoma, Inc. or Nevada Power Company to gain insight and see first-hand how other call centers are operating. Your tour facilitators will enable you to witness some of their successes and progress live.
- 5 Networking** - all your peers will be there. Network with THE leaders in Call Center operations from some of the most successful organizations in North America. This is the most comprehensive audience covering both function and industry.

Presented by:



Co-Sponsored by:



Featuring Best Practice
Case Studies from:

Depuy Spine, Johnson & Johnson **Fortune 100** New
The Center for Client Retention New
Best Practices LLC New
Caterpillar Financial **Fortune 100** New
Sprint **Fortune 100**
Merrill Lynch **Fortune 100**
Colonial Penn Life Insurance Company New
Caesars Entertainment **Fortune 500** New
Nationwide Insurance **Fortune 500** New
Health Net **Fortune 500** New
Access America New
Travelocity New
NCCI Holdings, Inc. New
Frito-Lay, Inc. **Fortune 100** New
Wyndham International New
Deloitte Services LLC New
T-Mobile USA New
Office Depot **Fortune 100** New
Herbalife International of America New
SunTrust Bank **Fortune 500** New
The Radclyffe Group, LLC
E-WRITE
DuPont
Kramer & Associates
Cardinal Health **Fortune 100** New
BenchmarkPortal
Cinergy **Fortune 500** New
Insight Management Consultants New
McKesson Health Solutions **Fortune 100** New
Oread Consulting Group, LLC New
The Elkind Group New
Omega Performance New
JP Morgan Chase **Fortune 100**
DALBAR New
TARP New
MassMutual Financial Group **Fortune 100** New
Empirix Inc. New
Corporate University Enterprise, Inc. New
Dow Jones & Company, Inc. New
HP **Fortune 100** New
Mackenzie Financial Corporation New
Hilton Reservations Worldwide **Fortune 500** New
1-800-flowers.com New
Anthem Blue Cross Blue Shield New

Register Today!

Call Center Week 2005

Call John at 416-598-9357 or email john.kremer@iqpc.com

Top 9 Reasons to be a Part of CALL CENTER WEEK 2005

① Call Center Week 2005 will feature the 1st Annual Call Center Excellence Awards. The awards will be presented at the Awards luncheon on Wednesday June 29, 2005. Be recognized by your Organization AND your industry.



The Call Center Excellence Awards have been established to honor, recognize and promote Call Centers that demonstrate true best practices. To identify and assess these leading organizations, IQPC has assembled a prestigious list of Call Center experts and leaders to accurately and objectively evaluate the true effectiveness of top Call Center Programs.

First Place and Honorable Mention Awards will be announced and given to the 2005 winners at the Awards Ceremony held **June 29, 2005** at **Call Center Week** in **Las Vegas, NV**. The top entries in each category will be denoted as finalists and will be contacted in advance of the Awards Reception.

Winners will be highlighted and promoted at **Call Center Week 2005**, a Conference devoted entirely to Call Centers. Additional coverage may also be provided in other publications, announcements and websites.

Call Center Excellence Awards are open to all Call Centers in all countries.

Enter one or all three categories

- 1) Call Center Leader of the Year
- 2) Best Use of Technology
- 3) Best in Class Call Center

The entries must be received by 11:59pm Eastern Time, May 20th, 2005.

② This event will include **30 brand new in-depth case-studies**, each specifically geared to fit into one of three tracks:

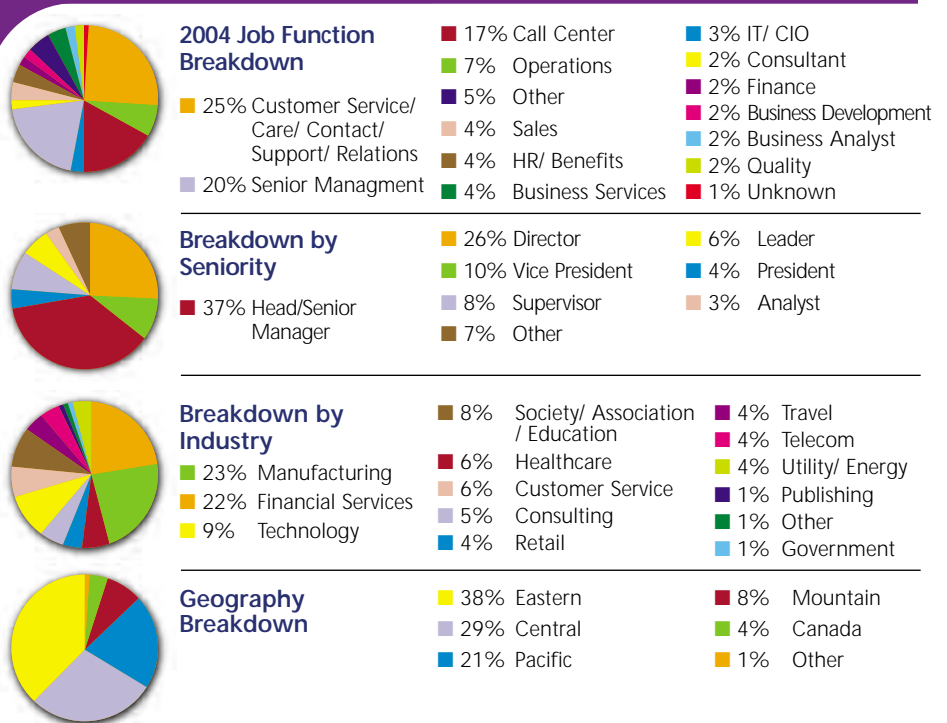
<i>Track A</i> People	<i>Track B</i> Measurement	<i>Track C</i> Strategies and Tools
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③ This event is designed for leaders of Call Center management to come together, hear best practices from other leaders and discuss the applicability of these ideas within their own centers. **Walk away with ideas to implement the minute you step back into the office.**

④ Choose from **14 Interactive Workshops**, providing an opportunity for all attendees to tailor their learning to fit their specific challenges. 35 - 50% of discussion is led by the attendees ensuring their challenges are discussed in full

⑤ **Networking – all your peers will be there.** Network with THE leaders in Call Center operations from some of the most successful organizations in North America. This is the most comprehensive audience covering both function and industry.

Breakdown for Call Center Week 2005

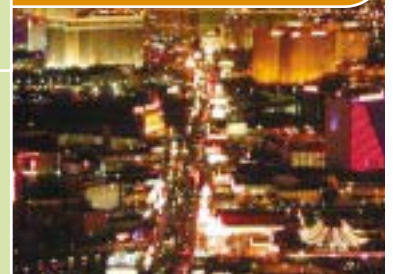


⑥ Go one of two exciting **Site Tours**. Visit William-Sonoma, Inc. or Nevada Power Company to gain insight and see first-hand how other call centers are operating. Your tour facilitators will enable you to witness some of their successes and progress live.

⑦ Hear from 30 new, never seen before case studies and stories to tell

⑧ Hear from **Eleven Fortune 100** and **Six Fortune 500** Case Study Presentations

⑨ It's a week in Las Vegas!



CALL CENTER WEEK 2005 SPONSORSHIP AND EXHIBITION OPPORTUNITIES

On Par With The Leaders: As a Sponsor your company will gain second to none exposure to those executives at the point in time that they are seeking solutions. The delegates in attendance will relate your firm's solutions to the high quality of information, best practices and award winning strategies represented at the 6th Annual Call Center Week. No other forum can compare in quality, depth or level of content as well as executive attendance to this conference.

Premium Branding: As a Sponsor your firm's logo will appear alongside the global leaders associated with best practices in this area. IQPC and the Call Center IQ leverage multiple media outlets including online, direct mail, email, press releases and media partnerships to publicize Call Center Week. As a Key Sponsor your corporate logo will be included in all aspects of the marketing campaign, additionally you will have a marketer working closely with you in the months up to the event assisting you to tailor delegate invitations targeting those companies at the forefront of your business development goals.

Face Time: Networking and information sharing are two major aspects of the event and IQPC builds in many opportunities for networking events into the conference agenda. As a Sponsor your company will have access to all onsite networking functions at the conference. They include two breakfast sessions, four refreshment break sessions and two conference wide luncheons.

Contact: For more details and to discuss your sponsorship package, please call Shannon Forrester 1 212 885 2719 or email sponsorship@iqpc.com

The Call Center Week 2005 conference is an excellent opportunity to market to your company's products or services to executive-level decision makers! This is your chance to provide our attendees with the solutions that they are looking for. Limited Sponsorship and Exhibition opportunities are available, including:

Refreshment Breaks · Luncheons · Welcome Packs · Exhibits

Current Co-Sponsor:



Empirix delivers solutions that help contact center managers maximize agent productivity, and maintain low costs by improving the quality and performance of your voice system infrastructure. Empirix empowers you to ensure superior Quality of Experience to customers by automatically identifying how infrastructure problems impact contact center services. By testing and monitoring performance from the end user perspective and the individual infrastructure components (ACD, IVR, CTI, database) with Empirix, you can proactively anticipate and prevent service-affecting problems within the contact center. Headquartered in Bedford, Massachusetts, Empirix is a privately held company, with offices throughout the United States, Europe and Asia. For more information, visit www.empirix.com.

Current Exhibitor:



Hear What Past Attendees Have Said About CCW:

"Great info! I cannot wait for next years conference"

**Vistakon, Inc. –
Johnson & Johnson**

"Great presenters with great stories! I learned through the mistakes and successes of others."

**Toyota Financial
Services**

"Excellent – The first year I've attended and I look forward to next year!"

Zurich Life

"Very good. There was something to take away from all presentations."

MWI Vet Supply

"I found this conference to contain the materials and information I was looking for."

Quest Diagnostics

"I attained a lot of useful information that we can implement in our call center. There were a lot of great ideas put out as well as fun suggestions. I enjoyed the whole conference!"

Neways International

Register Today: Call John at 416-598-9357 or email john.kremer@iqpc.com

**CONFERENCE
AT-A-GLANCE**



DAY 1 MONDAY
June 27, 2005

PRE CONFERENCE WORKSHOPS

8:30	Workshop Registration
9:00AM – 12:00PM choose A or B	<p>A A Step-by-Step Guide to Hiring and Training CSRs in Your Call Center</p> <p>B Quantifying the Direct Impact of the Voice of the Customer on Your Call Center</p>
12:00PM	Workshop Registration – Lunch will be served
12:15AM – 3:15PM choose C or D	<p>C Assessment Tools and Techniques to Measure Performance in your Call Center</p> <p>D Essential Writing Skills to Support E-mail and Web Self-Service</p>
3:15PM	Workshop Registration
3:30PM – 6:30PM choose E or F	<p>E Linking Key Performance Metrics to Customer Loyalty</p> <p>F Building a Motivated Call Center With Powerful Coaching Conversations</p>

DAY 2 TUESDAY
June 28, 2005

MAIN CONFERENCE

7:30	Registration – Continental Breakfast
8:15	Chairperson's Welcome and Opening Remarks
8:30	Improving the Efficiency and Effectiveness of Your Call Center Through Best in Class Benchmarking Herbalife International of America
9:30	Improving the Customer Experience to Increase Revenue and Drive Business · Deloitte Services LLP
10:30	Morning Break and Exhibit Viewing

Choose a Track or Bring a Team and Attend All 3!

	<i>Track A</i> People and Processes	<i>Track B</i> Measurement	<i>Track C</i> Strategies and Tools
11:00	Chairperson's Address: Kerry Elkind, President, The Elkind Group	Chairperson's Address	Chairperson's Address
11:05	Developing and Deploying Training Methods to Modernize CSRs Skill Sets DePuy Spine, a Johnson & Johnson Company	Developing and Implementing Balanced Scorecards to Drive Call Center Performance JP Morgan Chase	A Step-By-Step Guide to Benchmarking Your Contact Center Dow Jones & Company, Inc.
11:55	Uncovering the Hidden Factors that Lead to Staff Turnover Hilton Reservations Worldwide	Utilizing Performance Metrics to Increase Accuracy and Customer Satisfaction in Your Contact Center Access America	Leading a Virtually, Offshored and Outsourced Call Center Office Depot, Inc.
12:45	Luncheon for Speakers and Delegates		
2:00	A Step-by-Step Guide to Retaining and Motivating CSRs Colonial Penn Life Insurance Company	Developing Metrics for Managing & Measuring the Customer Experience Cinergy	Utilizing your Call Center to Improve your Lead to Sale Conversion Rate DuPont
2:50	Improving Performance in Your Call Center through Recruiting and Coaching Strategies T-Mobile USA	Quality Monitoring: Identifying the Challenges and the Benefits Starbucks Coffee Company	Benchmarking Panel Moderated by: Best Practices LLC
3:40	Afternoon Break & Exhibit Viewing		
4:10	The Outsourcing Decision: Keys to a Successful Launch Travelocity	The Control Phase of Six Sigma in Call Centers NCCI Holdings, Inc.	Analyzing the Use of Multi-Media Tools to Improve Customer Responsiveness 1-800-6wers.com
5:00	End of Day One		

5:00PM – 6:00PM CONFERENCE EVENING RECEPTION

Welcome delegates, speakers, sponsors and exhibitors of Call Center Week 2005! Join us for your first opportunity to meet fellow conference attendees at our kick off reception. Enjoy tasty desserts and drinks while you mingle with your peers!

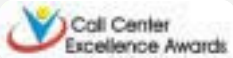
DAY 3 WEDNESDAY

June 29, 2005

MAIN CONFERENCE

CONFERENCE AT-A-GLANCE

Choose a Track or Bring a Team and Attend All 3!

8:15 Registration - Continental Breakfast			
	Track A People and Processes	Track B Measurement	Track C Strategies and Tools
9:00	Making Your Call Center the Focal Point of the Voice of the Customer Mackenzie Financial Corporation	Linking CSR Performance Corporate Strategy with Quantifiable Metrics Caesars Entertainment	Best Practices in Creating a Customer Service Program Caterpillar Financial
9:50	Revamping Your Incentive Programs: Identifying What Incentives Truly Motivate Your Agents Cardinal Health	Developing and Utilizing Metrics to Drive Customer Strategies and the Customer Experience HP Services Americas	Improving the Customer Experience with a Virtual Call Center McKesson Health Solutions
10:40 Morning Break and Exhibit Viewing			
11:10	Reducing Turnover and Absenteeism in Your Call Center to Create a More Productive Environment Wyndham International	A Step-by-Step Guide to Measuring Customer Satisfaction Frito-Lay, Inc.	Identifying Benefits of Utilizing Workforce Management to Streamline Staffing in Your Call Center MassMutual Financial Group
12:00	Awards Luncheon  Presentation of		
1:35	Increasing Productivity and Reducing Turnover Through Employee Satisfaction Nationwide Insurance	Utilizing Six Sigma to Improve Performance and Efficiency in Your Call Center Merrill Lynch	Identifying Benefits of Utilizing Voice Recognition Technology in Your Contact Center Health Net
2:25	Ensuring Your Contact Center Technology Works for You, Not Against You - A Case Study on Anthem Blue Cross Blue Shield Anthem Blue Cross Blue Shield Empirix Inc.	Benchmarking the Customer Experience to Improve Service Quality SunTrust Bank	Gaining Operational Efficiency and Improving Customer Satisfaction in Your Contact Center Sprint
3:05 End of Main Conference			



DAY 3 WEDNESDAY

June 29, 2005

CALL CENTER SITE TOUR

3:15PM - 5:45PM choose G or H	
G Nevada Power Company Site Tour	H Williams Sonoma Site Tour
5:45 Return to Hotel	

DAY 3 WEDNESDAY

June 29, 2005

MID CONFERENCE WORKSHOPS

6:00 Workshop Registration - Dinner will be served	
6:15PM - 9:15PM choose I or J	
I Strategies for Improving and Maximizing Self-Service in Your Call Center	J Building on the Lessons of the Leaders - Using the Experiences of Others to Accelerate Success

DAY 4 THURSDAY

June 30, 2005

POST CONFERENCE WORKSHOPS

7:30 Workshop Registration - Coffee/Tea	
8:00AM - 11:00AM choose K or L	
K Achieving Performance Excellence in a Multi-Channel Call Center Environment	L A Step-by-Step Guide to Implementing Performance Metrics for Your Call Center
11:00 Workshop Registration - Luncheon will be served	
11:15PM - 2:15PM choose M or N	
M Raising the Bar on Performance: Achieving Excellence Through Calibration, Coaching and Performance Management	N Designing and Implementing a Customer Interaction Model: Tools & Techniques to Manage Offshore and Outsourced Operations

Register Today: Call John Kremer at 416-598-9357 or email john.kremer@iqpc.com

Attend these pre-conference workshops and learn how to increase the quality and productivity of your call center.

8:30am – Workshop Registration ↙

9:00AM – 12:00PM choose **A** or **B**

A A Step-by-Step Guide to Hiring and Training CSRs in Your Call Center

In order to enhance performance, minimize employee turnover, create a professional position and environment, and build trusting relationships with customers, it is important to design and utilize strategies to motivate all contact center employees. In this session, participants learn how companies are using a specific, integrated approach to hiring, training and employee retention.

I. Achieve World Class Service through an Integrated Training Approach

- Learn key strategies and training components for success
- Achieve consistency across all contact centers within the corporation
- Operationalize ongoing training

II. Motivate your Contact Center Team

- Structure winning employee incentive programs
- Explore proven strategies for motivating contact center employees and improving employee satisfaction
- Coach to motivate - consider the connection between employee and customer satisfaction
- Monitor, measure and expect results - learn to capture effective data, create a trending analysis and measure ROI of motivational programs

9:00AM – 12:00PM choose **A** or **B**

B Quantifying the Direct Impact of the Voice of the Customer on Your Call Center

Most Voice of the Customer (VOC) processes focus on rework which costs the call center extra money. The real payoff is in the enhanced revenue from higher customer satisfaction. Twenty times as many customers say the call center has the greatest effect on their opinion of the organization as advertising or sponsorships. However, 70% of VOC processes have little impact, mainly because they cannot demonstrate the payoff of improvements in a manner the CFO will accept. This session will show you how to quantify the revenue and word of mouth implications of better quality and service from the call center as well as making the call center the focal point of the organization-wide VOC Process.

In this workshop you will learn how to:

- Lead to an effective VOC Process
- Extrapolate the calls you receive to the marketplace as a whole
- Conservatively estimate the revenue at risk if improvements are not made, thereby creating the economic imperative for action.
- Tie call quality monitoring data to survey data to improve both call center operations and the impact of the VOC.
- Integrate data from all your touch points into a single unified picture of the customer experience

Topics covered include:

- Customer behavior upon encountering problems

12:00pm – Workshop Registration – Lunch will be served ↙

12:15PM – 3:15PM choose **C** or **D**

C Assessment Tools and Techniques to Measure Performance in your Call Center

Do you know how well you are servicing your customers? This interactive workshop will provide you with proven assessment tools and techniques used by some of the best service providers to measure call center performance. Participants will learn why to measure, what to measure, how to measure, which tools and techniques to use, how to use the results to keep staff motivated and continuing to strive for service excellence. Participants will be asked to confidentially share their best practices with others in the workshop so that participants can learn both from DALBAR'S expertise as well as from peers.

Participants will learn:

- The what, why, how and frequency in measuring service with assessment tools
- How to take action and achieve success with the output derived as a result of utilizing the assessment tools
- How to use the results to motivate and reward

Topics covered include:

- Why quality service is important
- Why call centers need to measure the service they are providing
- Determining what to measure
- How to measure call center service using an assessment tool

- Understand when it is time to change motivational programs
- ### **III. Promote from Within – Career Paths for Call Center Agents**

About Your Workshop Leader:



Liz Ahearn is the **President and CEO** of The Radclyffe Family of Companies which include, **The Radclyffe Group, LLC** a consulting and training firm dedicated to promoting the customer interaction as a mission-critical business function relevant to all decision-making operations across a corporate enterprise. Radclyffe Solutions, LLC a best practices model contact center co-sourcer and Radclyffe University, LLC a learning organization dedicated to the practical education of contact center leaders through certification programs. As part of a holistic approach to contact center improvement, the three firms integrate to offer clients a "Learn, Apply and Implement" experience which ensures that not only does learning take place, but actual positive contact center change occurs as a result. Liz is an expert in Contact Center Optimization, Customer Relationship Management (CRM), Performance Improvement Strategies, Contact Center Culture, and Customer Satisfaction.

- Causes of dissatisfaction - only 20% is employees doing something wrong, most come from broken processes, bad policies, and uninformed customers
- Estimating the number of problems for each contact received
- Converting problem data into revenue at risk in a manner that CFOs
- Evaluating your VOC process to identify weak points leading to low impact
- Setting rational targets for improvement
- Linking targets to incentives in a constructive manner

About Your Workshop Leader:



In 1972, **John Goodman** became a **Founding Member** of TARP, a research and consulting organization that specializes in customer service and quality improvement. Throughout his career John has managed more than 600 separate customer service studies, including TARP's White House sponsored evaluation of complaint handling practices in government and business, studies quantifying word-of-mouth, and the bottom-line impact of consumer education, as well as five benchmark studies of the use of toll-free service numbers by major corporations. He has taught courses on quality measurement and improvement for Wharton Business School Executive Education and the American Society for Quality. John graduated from Carnegie Mellon University with a B.S. in chemical engineering. He received an M.B.A. from Harvard Graduate School of Business Administration.

- Determining how often and how many calls you should measure
- Use assessment tools to measure your call center against your competition
- Use results to reward some reps and to motivate other

About Your Workshop Leader:

Brooke Gullicksen is the **Vice President of Call Center Marketing** at DALBAR. Brooke joined DALBAR's Client Service Group in 2001 and since then, her role has expanded to growing the relationships with DALBAR's existing clients, building relationships with new clients as well as heading up DALBAR's print marketing efforts to call centers. Previously she has worked as a customer service representative at Equitable for their Accumulator annuity product. After less than a year in that position, she became the first Call Coach for the Equitable Accumulator. During that time, she worked closely with DALBAR, in order to help raise Equitable's level of customer service. For the year following she served as Product Trainer for the operations area before being promoted to Product Trainer/Team Leader of the Product Resource Center at Equitable Distributors, Inc., in Manhattan.

12:15PM – 3:15PM choose **C** or **D**

D Essential Writing Skills to Support E-mail and Web Self-Service

Gone are the days when customer service agents can say, "We have the product knowledge; we don't need to know how to write." To support customers, agents need to know how to write e-mail and self-service content that is predictable, clear, and easy to follow. If they can write well, the online help agents provide will be the backbone of self-service initiatives, not a graveyard for small bits of information. Make the self-service dream come true. The dream goes something like this: "Now that we offer our customers web self-service, they answer their own questions. The phones are quiet and the e-mail flow has dwindled to a trickle." This self-service dream includes images of a 24/7, personalized, customer-enabling, transaction-completing, automated wonder. Three written components are at the center of this dream: knowledgebase entries, FAQs, and canned e-mail responses. This workshop will help build the essential, specific writing skills your staff needs to do the job.

About writing knowledgebase entries, you'll learn how to:

- Develop guidelines for writing entries, so that your knowledgebase will be uniformly effective, no matter how many people contribute entries.
- Explain the importance of writing well to all knowledgebase contributors.
- Write knowledgebase entries that help both technical and non-technical users.

About writing FAQs, you'll learn:

- Strategies for organizing FAQs so that customers can easily find what they need
- Choose the appropriate question word for the FAQ so customers can identify the

- FAQ as the answer to their question
- Write FAQs that provide a complete answer
- Write to FAQs that help both expert and novice users

About writing canned e-mail responses, you'll learn:

- How to write useful canned answers that completely resolve the customer's problem
- When to send a canned response and when to compose an original response
- How to customize canned answers without rewriting them entirely

About Your Workshop Leader:



Leslie O'Flahaven is the **Founder and President of E-WRITE**, which has customized courses and workshops for Fortune 500 companies, Internet start-ups, federal and local governments, and nonprofits. They've developed courses for American Airlines, Coca-Cola, Fannie Mae, Prudential, Humana, The College Board, Key Bank, Pan American Health Organization, the U.S. Air Force, FedWeb, and The National Wildlife Foundation. Participants in their courses and workshops include high-level executives, marketing and web teams as well as customer service agents. Leslie has a special interest in teaching writing to front line administrative and support personnel who communicate with customers directly, every day.

3:15pm – Workshop Registration

3:30PM – 6:30PM choose **E** or **F**

E Linking Key Performance Metrics to Customer Loyalty

Each day, highly satisfied customers who are delighted with your service inexplicably move their business to your competitors. In this session, you will learn how your contact center can, and should be at the center of your customer loyalty strategy to stem this tide of defection. In this session you will tap into expertise and best practice examples that can be applied immediately to your call center. The will be a how-to workshop that has applicability to the request for customer loyalty results that senior managers are requiring.

Topics of discussion will include:

- Hiring the right people
- Providing the tools that foster success
- Assembling and assimilate
- Translating business goals into contact center goals
- Taking action when exceptional events occur
- Compensating your contact center staff for increases in customer satisfaction

Attendees will also:

- Learn why customer loyalty is so valuable to an organization
- Understand how to make the contact center an essential component of a customer

loyalty strategy

- Identify five fundamental principles in building customer loyalty in the contact center
- Discover ways to implement retention techniques that yield long-term, successful customer relationships

About Your Workshop Leader:



Anne Ivey serves as a **Leading Consultant** to the contact center industry for **Omega Performance**. She has a rich history as a regarded advisor, consultant and partner to executives in the contact center industry, helping them to develop their corporate strategies and contact center initiatives. She has an extensive background in developing business plans, diagnosing operational gaps, and implementing results-oriented sales culture initiatives in contact centers of all sizes. Anne has both a breadth and depth of experience in establishing and growing high-performing teams. She has worked extensively in the financial services industry with banks, insurance companies, and card services groups in the United States and abroad.

3:30PM – 6:30PM choose **E** or **F**

F Building a Motivated Call Center With Powerful Coaching Conversations

World-class service, sales, productivity and quality - what more can one possibly expect from our agenda? Add constant changes in customer demands, roles, responsibilities, technology, processes and systems and you have a very difficult job - that of the CSR. It's no wonder that so many CSRs feel powerless, frustrated unappreciated and undervalued. And it's no wonder that so many Call Center Managers have to struggle with ongoing problems of turnover, attendance and poor performance. Leading Call Centers have discovered that powerful coaching conversations can actually be one of the most effective ways to empower and motivate CSRs. In this workshop participants will learn to transform their call center by conducting powerful coaching conversations.

Specifically, participants in this workshop will leave with practical, working knowledge that will enable them to:

- Conduct powerful coaching conversations that improve performance, morale, and accountability
- Assess their coaching effectiveness
- Identify the differences between coaching and evaluating
- Gain buy-in to changing and improving performance

- Earn the right to coach
- Provide feedback that gets results

About Your Workshop Leader:



Kerry Weiner Elkind is **President and CEO of The Elkind Group**, a San Francisco based company providing business communication skills needed to create winning relationships with customers and employees to maximize service, sales and collections.

Kerry has over 20 years experience working in the call center environment in a variety of industries. She works with market-driven companies to improve the performance of their front-line customer contact employees and managers who are responsible for customer service, sales, and collections. She is a national speaker and co-author of, "Free Agents: People and Organizations Creating a New Working Community" and "Common Sense Leadership for an Uncommon 'Next Generation' Workforce". Kerry is a nationally recognized consultant, trainer, and speaker. Her client list includes Fortune 1000 companies in a variety of industries.

7:30
Registration – Continental Breakfast

8:15
Chairperson's Welcome and Opening Remarks

8:30
Improving the Efficiency and Effectiveness of Your Call Center Though Best in Class Benchmarking

Achieving best in-class benchmarking requires support from the top and great execution by the call center operational management team. Find out how Herbalife, three times national award winning call center, used the benchmarking process to improve its efficiencies and effectiveness. This session will provide you with the framework and practical tools to implement the required planned change to become a world class operation.

This presentation will share real-life information and experiences and the lessons learned by the Herbalife management team. What drove the leadership to make the change, what results were they expecting, what solutions did they implement to support the strategic change and how did their financial performance change?

Topics covered include:

- The value of a benchmarking audit and the compelling reasons to benchmark your call center
- Developing strategies and planning the steps to become best in class
- Practical management tools to provide the highest levels of customer service, become the employer of choice and create operational excellence



Michele Crocker
Vice President of Distributor Services North America
Herbalife International of America

Michele has worked in the call center industry within Europe and the US for 15 years. Starting her career in the British Airways call Center, London, she then set up operations for UPS in Europe. In addition, Michele was responsible for the call center operations for DHL and Cable Wireless European division.



Jameese Smith
Senior Manager, Distributor Services, Quality & Operations
Herbalife International of America, Inc.

Jameese's experience includes development and implementation of homegrown technology to support call centers with strict budgets. Her support to areas of operations covers, Quality Customer Service, Process Improvements, Scheduling & Forecasting, Intranet & Database Administration and On-hold message production.

9:30
Improving the Customer Experience to Increase Revenue and Drive Business

Improving the customer experience is the key to increasing revenue and driving business. By continually working to evolve the customer experience, you will be able to maximize profitability. This session will examine of all the factors that impact the customer experience and you will hear ideas for enhancing customer experience.

The topics of discussion will include:

- Time in queue - how to minimize customer time in queue by developing a cross-functional support model.
- Call quality - call coaching strategies that are

focused on customer expectations with an emphasis on determining the customer's needs and providing the maximum level of service

- Service level coordination - dedicating resources to manage call center performance and respond to real-time changes in call volume and escalations
- Creating a virtual call center - in today's global sourcing marketplace developing strategies for ensuring that customer experience is seamless regardless of what call center they reach
- Measuring customer experience - using survey tools to allow call centers to respond to what customers say is most important to them and how to take action on improvement areas

Craig Brasington
Quality Assurance Manager
Deloitte Services LLP

Craig Brasington has over 13 years of professional experience in customer service, sales, banking, human resource, and technical support. Craig has recently accepted a new position as the Quality Assurance manager for Deloitte's Personal Service Network.

Lisa Toon
Operations Manager
Deloitte Services LLP

Lisa Toon is a results-oriented business professional with over 12 years in the customer service, human resource, and technical support industries. She is known for the ability to quickly assess call center operations and implement the proper balance of people, processes, and technologies to improve employee productivity and achieve high client service levels. Lisa was recognized in 2004 as the STI Enterprise Support Manager of the year.

10:30
Morning Break and Exhibit Viewing

Choose a Track or Bring a Team and Attend All 3

Track A People and Processes	Track B Measurement	Track C Strategies and Tools
11:00		
Chairperson's Address: Kerry Elkind, President, The Elkind Group	Chairperson's Address:	Chairperson's Address:
11:05		
<p>Developing and Deploying Training Methods to Modernize CSRs Skill Sets</p> <p>Whether you are training a new hire or coaching a current employee, training to a person's style is vital to success. Training materials should be adapted to incorporate every learning style to assure that everyone grasp the essential lessons. Our business needs change day-to-day. Attend this session to see some of the less conventional ways to convey these changes to call center staff in order produce optimum results.</p> <p>Topics of discussion will include:</p> <ul style="list-style-type: none"> • Identify individual learning styles and how to coach to them • Develop training or coaching methods that encourage process improvement • See how monitoring and mentoring programs can assist in the development of new or existing staff • What sort of things can be done to help your staff think outside the box 	<p>Developing and Implementing Balanced Scorecards to Drive Call Center Performance</p> <p>Balanced scorecards can be valuable tools in driving call center results. However, the effectiveness of their design and implementation can easily make the difference between success and failure. Selecting the best metrics, achieving the right balance between metrics, and aligning goals at each level, are all critical components of scorecard design. Implementation, which includes communicating the scorecards and motivating substantive performance discussions and improvement, is just as important to their success. In this session, you will learn proven approaches to the design and implementation of balanced scorecards and how to ensure they remain an effective performance management tool in a changing business environment.</p> <p>Participants will learn:</p> <ul style="list-style-type: none"> • The key components of an effective scorecard design • Scorecard implementation processes which drive results • Results that can be achieved from a successful scorecard process • How to ensure scorecards remain relevant in a changing environment 	<p>A-Step-By-Step Guide to Benchmarking Your Contact Center</p> <p>Aligning the corporate and/or divisional strategy and goals are vitally important to your benchmarking and measurements efforts in the contact center. It is critical to select the right measures, establish clear goals, monitor performance, and close the loop with improvement processes. Contact center measurements are easily found, but you must ensure that you select the right ones for your business. In this session, you will learn how to align business strategy to the correct measures and develop closed-loop improvement initiatives.</p> <p>Topics of discussion include:</p> <ul style="list-style-type: none"> • Selecting metrics aligned with business strategy • Utilizing benchmarking to compare your center's performance to your peer group • Aligning personal scorecards to selected metrics to drive operational excellence • How to ensure cross-functional integration occurs across the enterprise <p>This session will allow both the contact center newcomer and veteran to take-away practical knowledge to facilitate improvement in their contact center. The discussion will drive both a strategic and tactical view of how to improve operational performance to achieve the desired balance of efficiency and effectiveness.</p>
<p>Johanna Taylor Customer Service Supervisor DePuy Spine, a Johnson & Johnson Company</p> <p>DePuy Spine, Inc. is an operating company of DePuy, Inc., a Johnson & Johnson company, one of the world's leading designers, manufacturers, and suppliers of orthopaedic devices and supplies. We are known throughout the medical world for the development, manufacture, and marketing of innovative solutions of a wide range of spinal pathologies. DePuy Spine is headquartered in Raynham, Massachusetts.</p>	<p>David W. Harris Vice President, Scorecard Operations JP Morgan Chase</p> <p>David Harris is Vice President of Scorecard Operations for JP Morgan Chase Cardmember Services. In this assignment, he is responsible for a variety of performance management processes, including the development and implementation of monthly performance scorecards for approximately 7000 Card Services employees.</p>	<p>Tom Dubay Contact Center Director Dow Jones & Company, Inc</p> <p>Tom Dubay is the Contact Center Director for Dow Jones & Company. In this role, he is responsible for customer service in support of the Wall Street Journal and Barron's publications. Tom is responsible for the day-to-day operations, including the outsource partner relationship, as well as the Training and Quality functions within the center.</p>

11:55

Uncovering the Hidden Factors that Lead to Staff Turnover

Staff turnover slows down productivity and effectiveness, not to mention increases costs. In this session you will learn how to decrease turnover and improve your employee satisfaction to ultimately increase productivity and efficiency. Training programs, incentives and a commitment to employee satisfaction are all aspects of uncovering hidden factors that lead to staff turnover and all keys to successful call centers.

Topics of discussion will include:

- Identifying the most effective methods of measuring employee satisfaction
- Best practices for incentivizing your CSRs
- Setting goals for CSRs to encourage them to maximize productivity and efficiency
- Increasing motivation for your employees



Karen Barker
Director of Call Center Operations
Hilton Reservations Worldwide

Karen has been an employee with Hilton for 15 years. She has worked on the call center side of things for about the past six years managing a 450 person call center. She is now transitioned into a new role and is responsible for the real numbers, day to day operations and making sure operational targets are hit. She is responsible for scheduling, staffing and the communication side of things. She recently moved to Dallas to take on these new tasks.

Utilizing Performance Metrics to Increase Accuracy and Customer Satisfaction in Your Contact Center

This session will discuss how to improve accuracy and customer satisfaction through the use of performance metrics. The session will focus on the journey to improve quality and customer satisfaction from inception through deployment. Included in the case study will be successful strategies and pitfalls to avoid.

Key topics to be discussed include:

- Defining goals
- Contact center metrics
- Individual performance metrics
- Call monitoring
- Measuring customer satisfaction
- Analyzing results



Paula Chamberlain
Manager, Customer Service
Access America

Paula Chamberlain is the Manager of Travel Customer Service for Access America, a division of World Access. As the Manager of Travel Customer Service, she is responsible for aspects of customer contacts including sales, customer service and claim inquiry.



Josh Chapman
Director, Travel Operations
Access America

Josh Chapman is the Director of Travel Operations for Access America. He is accountable for every customer contact at Access America, including sales, customer service, and claim adjudication.

Leading a Virtually, Offshored and Outsourced Call Center

The move to handle customer demand virtually and offshore presents a unique opportunity for a company to enhance its competitive position by reducing expenses and reaping collateral benefits from the capabilities of outsourcers. In this session you will learn the five key components to ensure that the service profit chain is leveraged.

Topics covered will include:

- Performance Management
- Financial Management
- Contract Management
- Relationship Management
- Resource Management



Julian Carter
Director of Operations and Strategic Partnerships
Office Depot, Inc.

Julian Carter has been with Office Depot, Inc. for the last 9 years and currently has P&L responsibility for the Customer Service virtual and international outsourced strategic partner programs. Managing 20M Contacts he will employ nearly 3000 virtual and offshored agents. Julian is also responsible for establishing new relationships with prospective partners in order to drive revenue, decrease cost and maintain or increase quality within 2 brands and multiple selling channels, including 2 brick and mortar locations.

12:45

Luncheon for Speakers and Delegates

2:00

A Step-by-Step Guide to Retaining and Motivating CSRs

Whether you have new or seasoned CSR's in your call center, retaining and motivating your CSR's is an ongoing challenge for your frontline managers. Find out what you can do in your call center to energize and engage your entire staff. Have fun while increasing the morale, enthusiasm and productivity of your call center, all the while lowering turnover and reducing your recruiting costs.

Topics of discussion will include:

- An interactive session on what you can do to motivate and engage your CSRs
- Learn team building methods that will work in your call center
- Involve CSR's in making your business a better place to work
- Improve employee enthusiasm, morale and motivation
- Achieve employee understanding of performance measurements and buy-in



Glyn D. Edwards, FLMI, ACS
Assistant Vice President
Life/Health Sales & Service
Colonial Penn Life Insurance Company

Glyn is the Assistant Vice President of Life/Health Sales & Service, at Colonial Penn Life Insurance Company, located in the historic Old City section of Philadelphia, Pennsylvania. Glyn is responsible for the management of the inbound and outbound, day and evening sales operation, where he oversees 140 licensed insurance sales agents available to assist customers with their purchasing and service needs. His call center was rated "Best Practices" in 2004, by the Gallup Organization, and rated "Call Center of the Year" by Call Center Magazine in 1998.

Developing Metrics for Managing & Measuring the Customer Experience

In a call center environment, customer satisfaction is a key performance measure that can be easy to track but difficult manage. How do you go about setting up a successful customer satisfaction program that:

- Incorporates the voice of the customer to drive operational excellence?
- Engages employees?
- Supplies the tools to identify opportunities for improvements?
- Effectively communicates the results (down to the employee level)
- Incorporates benchmarking data from the competition?

In this presentation you will learn how Cinergy's customer satisfaction program successfully addresses these questions and more. Cinergy's program has been in place for over 5 years and is a cost-effective program that ties customer satisfaction to employee pay.



John W. Kappesser
Customer Care Services
Cinergy

John Kappesser works in the Customer Care Services department at Cinergy as a senior analyst. John has established an internal tracking survey within Cinergy that measures customer satisfaction down to the employee level. All employees within the Regulated Business Unit of Cinergy have an incentive tied to the results of the internal tracking survey. As the owner of customer satisfaction within Cinergy, John created the survey measurement tool including sampling requirements, the actual surveys, metrics tied to the survey, reports from the survey and customized analysis tools for departments within Cinergy.

Utilizing your Call Center to Improve your Lead to Sale Conversion Rate

The internal call center is becoming an increasingly important contributor to successful growth strategies in the business. In addition to providing traditional call center activities, many companies are challenging their call centers to play a critical role in converting inquiries to qualified leads, many of which will result in new sales for the business. By proactively collaborating with Marketing and Sales executives, call center managers can identify effective lead qualification, segmentation, prioritization and routing processes, enabling marketing and sales professionals to grow their business with minimal cost expenditure.

In this session, you will learn how to:

- Collaborate with Marketing and Sales executives to develop effective inquiry handling, lead qualification, segmentation, prioritization and routing guidelines for inquiries from all channel sources
- Select the right measures and performance goals to ensure alignment with business growth strategies
- Establish the internal call center as a valuable contributor to sales and marketing effectiveness



Sandra L. Beckwith
Customer Contact Manager
DuPont

Sandra Beckwith started at DuPont in 1979 as a Sales Trainee and shortly after became a Product Specialist for Flexible Packaging, Fabrics & Finishes. She participated in the successful launch of a new, high solids polyester adhesive for food and industrial packaging. Sandra then joined Customer Care Services in 1998 as the CRM Program Manager. In 2004, Sandra became the Customer Contact Manager and currently manages the corporate contact center.

2:50

Improving Performance in Your Call Center through Recruiting and Coaching Strategies

This session focuses on how T-Mobile's Customer Care team utilizes recruiting and coaching strategies to help them deliver a differentiated service experience that is truly memorable to customers. In 2004, T-Mobile received the highest ranking in J.D. Power and Associates Wireless Customer Care Performance StudySM, scoring 10 points above the industry average. The study measured how satisfied wireless customers are with the overall experience of calling into the customer service centers of its respective providers.

Topics of discussion include:

- Assessing a successful mix of skills to hire against
- Infusing the culture with positive leadership
- Partnering with local centers
- Developing a measurement system against key leadership competencies
- Developing and deliver leadership development around weakness gaps
- Utilizing an effective coaching model
- Delivering performance improvement initiatives
- Training operational focus

 **Greg Schatzlein**
Director of Enterprise Learning & Development
T-Mobile USA

Greg Schatzlein is Director of Enterprise Learning & Development for T-Mobile USA. Greg has 20 years of experience in training positions that focus on impacting business results. He has worked for a diverse range of companies including Wilson Learning, Honeywell and SBC, where he was the General Manager of a 400 person call center that earned the highest service and sales rankings for their division.

Quality Monitoring: Identifying the Challenges and the Benefits


A Quality Monitoring program has direct impact on the operation of a call center, the enterprise it supports and the customers it serves. This real life case study will discuss the challenges and benefits Starbucks Coffee Company encountered on its quest to provide legendary service.

Challenges:

- Developing an effective QA program -overcoming CSR's history with QA programs, monitoring the things that count, and building trust
- Deciding who will conduct the program - finding or training true coaches, not disciplinarians, who are able to assist CSRs in improving their performance
- Technology -Building a case for acquiring technology that reflects the company culture and provides a solution that matches the QA program

Benefits:

- The Customer Service Representative -reduced retention, improved performance, and greater job satisfaction
- The Team -higher morale, consistent processes and procedures and identification of group training needs
- The Company -information acquired during customer interactions can provide business intelligence to assist in solving root cause issues
- The Customer - interactions with external customers can create enthusiastically satisfied and loyal customers

 **Beverly Stryker**
QA & Training Manager, Customer Contact Center
Starbucks Coffee Company

Beverly Stryker joined Starbucks Coffee Company in January 2003 as QA & Training Manager of the Customer Contact Center (CCC). Her group provides quality assurance monitoring and coaching as well as training for the Customer Service Representatives who are dedicated to providing the highest level of customer service and satisfaction.

Best Practices for Benchmarking Your Call Center Panel Session


What are the best ways to benchmark your call center? How are other organizations and your competitors benchmarking themselves? What are industry leaders saying about their successes with benchmarking? During this interactive panel session you will find out! This session will also explore the best and most effective management practices, based on benchmarking.

In this open forum discussion, you will have the opportunity to discuss and inquire with your peers about what the most efficient benchmarking practices and the most current performance objectives are. The panel will discuss thoughts and insights on key performance indicators, cost savings methods and metrics. This session will allow for thoughts and ideas to be shared from all different industries, creating a most efficient arena for you to uncover the best practices in benchmarking.

Other topics of discussion will include:

- Improving agent and customer satisfaction levels
- How to improve operational efficiency and effectiveness
- Best practices in benchmarking

Moderated By:

 **Teresa Esposto**
Best Practices LLC

Panelists will include:

Joe Martucci
Performance Measurement Leader
PSE&G

Other Panelists to be confirmed

3:40

Afternoon Break & Exhibit Viewing


4:10

The Outsourcing Decision: Keys to a Successful Launch

Outsourcing can no longer be defined simply as a long-term contract with another company. It is a major decision to create a strategic relationship between partners, with shared risks and goals. Finding the right partner takes time; working with that partner to launch your operation takes patience and deliberate focus. In this session, learn what it takes to make the decision and get your operation up and running.

Topics covered include:

- Selecting the right vendor based on criteria, not just cost
- Creating a solid, performance based contract
- Must haves for managing a successful migration and launch

 **Mark Weiner**
VP of SCC Business Development
Travelocity

Mark Weiner is the vice president of SCC business development for Travelocity, a leading online travel agency with millions of registered members. He is responsible for partner relationships, process management, product analysis and strategic planning activities for Travelocity's contact center organization.

Lesley Harris
VP Sales & Customer Care Team
Travelocity


Lesley Harris is vice president of the Sales and Customer Care team for Travelocity. She has responsibility for leading Travelocity's off-line global call center enterprise in support of consumer sales and service support. More than 1,500 agents in multiple locations handle upwards of four million calls and written contacts from customers per year.

The Control Phase of Six Sigma in Call Centers

This presentation highlights the advantages of implementing a control system through the Six Sigma process. The key areas of focus are: how to manage key processes in a call center using process and result indicators, charting indicators using control charts, and trending results and determining actions to take based on trends versus single data points.

Topics of discussion will include:

- Understanding variation within call center metrics
- Managing with a combination of process and result indicators
- Predicting performance using control charts

 **Ilene Lustigman**
Director of Customer Service
NCCI Holdings, Inc.


Ilene Lustigman is the director of Customer Service for NCCI Holdings, Inc. in Boca Raton, Florida. NCCI is the nation's most comprehensive insurance provider of workers compensation information, tools, and services for 41 states. Lustigman manages the 72-person Customer Service Department- the primary point of contact for the initial customer experience at the company. Under her direction, more than 500,000 customer interactions and 75,000 pieces of correspondence are handled annually.

Analyzing the Use of Multi-Media Tools to Improve Customer Responsiveness


The web-enabled contact center is the next evolutionary step in customer service, but there is more to the web enabled contact center than simply bringing internet connectivity to your call center. This presentation looks at the essential building blocks required for transitioning your call center into a web enabled contact center capable of supporting multi-channel communications and eService initiatives.

Participants will learn how to:

- Transition the inbound call center into a multi-media contact center
- Determine which technologies warrant investment and with what priority
- Deploy multi-media agents across all contact points (telephone, IVR, email and chat) to provide a consistent voice to customers

 **Rosemary Eady**
Vice President, Planning & Call Center Management
1-800-flowers.com

Rosemary Eady is currently employed as the Vice President of Planning and Call Management with 1-800-Flowers.com.

 **Thomas Zito**
Director of Operations
1-800-flowers.com

Thomas Zito is currently employed as the Director of Operations with 1-800-Flowers.com. Tom is responsible for the performance of people, process, and technology across the 1-800-Flowers.com service center enterprise. Tom has 12+ years of experience within the 1-800-Flowers.com call center operation.

5:00

End of Day One

5:00

CONFERENCE EVENING RECEPTION

Welcome delegates, speakers, sponsors and exhibitors of Call Center Week 2005! Join us for this opportunity to meet fellow conference attendees at our kick off reception. Enjoy tasty desserts and drinks while you mingle with your peers!



8:15
Registration – Continental Breakfast

Track A People and Processes	Track B Measurement	Track C Strategies and Tools
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8:55	8:55	8:55
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Chairperson's Address	Chairperson's Address	Chairperson's Address
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9:00	9:00	9:00
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Making Your Call Center the Focal Point of the Voice of the Customer

Call center data is viewed by most marketing and senior executives as being atypical and therefore not important as a voice of the customer. When properly packaged and combined with other data and then converted into revenue implications, call center data can become the keystone for the whole VOC process. This presentation will teach you how to extrapolate your data to the marketplace as a whole and convert it into financial implications that the CFO will accept, thereby making the call center the owner of the VOC process.

Topics of discussion will include:

- Outlining the basic methodology for the VOC
- Implementing the methodology for the VOC process
- Turning call center data findings into revenue



Jackie Laser
Assistant Vice President of the Contact Center
Mackenzie Financial Corporation


Jackie has been employed by Mackenzie Financial Corporation for the past 15 years. Mackenzie Financial Corporation is a multi-faceted investment management and financial services corporation whose core business is the management of mutual funds on behalf of North American investors. Jackie is currently the Assistant Vice President of the Contact Center and has worked in that capacity for 2 1/2 years. Since starting out as a Customer Service Representative in 1989 she has held different positions within the company on both the service and operational sides of the business.

Linking CSR Performance and Corporate Strategy with Quantifiable Metrics

Choosing the most accurate metrics to improve performance of your CSRs is critical to increasing productivity and effectiveness for your corporate strategy. Without the right employees your success can decline or greatly increase. In this session you will hear how to best align your metrics to meet your goals, and how to best improve CSR performance to drive business.

Topics of discussion include:

- Defining your key performance indicators
- Identifying the most effective methods of measuring performance
- Monitoring performance metrics to increase effectiveness



Robin Noma'aea
Director, Contact Centers
Caesars Entertainment

With 16 years of experience in hotel operations, Robin's career success and expertise is in performance execution. Robin will share the disciplines of how to move your operation from identifying and taking ownership of top company goals to then cascading them down to the frontline without losing commitment or clarity.

Best Practices in Creating a Customer Service Outsourcing Program

Caterpillar Financial, a \$2 billion subsidiary of Caterpillar, Inc., a \$30 billion Fortune 50 company, developed a private label credit card in 2004 for its customer base to utilize at Caterpillar Dealers nationwide. In the process of this development, the decision was reached to outsource the customer service and collection functions. This presentation will highlight the strategies and issues involved in starting and partnering in outsourcing a new customer service organization.

Topics of discussion will include:

- Path to a decision
- Why Outsource?
- The service level agreement and statement of work
- User acceptance and pilot
- Looking back & moving forward



Michael Maffei
Manager of Customer Service
Caterpillar Financial

Michael Maffei is the Manager of Customer Service for Caterpillar Financials Private Label Credit Card called the AccessAccount. In this assignment, he leads the company's efforts in managing customer service and collections. Primarily responsibility is leveraging and managing the outsourcing relationship with EDS. Prior to Caterpillar, Maffei served as Senior Director of Client Services for Sykes Inc in Tampa, Florida.

9:50	9:50	9:50
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Revamping Your Incentive Programs: Identifying What Incentives Truly Motivate Your Agents

What do your agents really want? Is it money, recognition, gift certificates? All of these things are nice, but, they may also be looking for empowerment, education, or possibly more challenging work. Not traditionally thought of as incentives these tools can be very powerful in satisfying your agents and getting top notch quality performance.

Topics covered are:

- Understanding what to incent
- Are traditional incentives pass?
- How coaching, empowerment, and more work can be excellent incentives



Beth Marchetti
Customer Service Manager – Swedesboro Division
Cardinal Health


Beth Marchetti is the Customer Service Manager for the Swedesboro Division of Cardinal Health, a world wide leader in the health care industry. With over 14 years of Customer Service Management experience, Beth has been the Customer Service Manager in the Cardinal Health Swedesboro division of Pharmaceutical Distribution for the past 7 months. She oversees the inbound call center and the Inside Sales group and has been charged with bringing technology changes to the department and career pathing and incentive programs to the Customer Service staff.

Developing and Utilizing Metrics to Drive Customer Strategies and the Customer Experience

Total customer experience is the accumulation of the impression that customers gather as they move through a company's customer lifecycle. Customer loyalty is the measure of how well a company meets customer expectations across the customer lifecycle. Customer loyalty can be measured through a survey process that defines overall satisfaction, willingness to repurchase and willingness to recommend to others.

Topics of discussion will include:

- Identifying key performance drivers through metrics to increase quality
- What it takes to fulfill all your customers needs
- How to best train your CSRs to better serve your customers



Kim Mims
Manager, Total Customer Experience
HP

Kim Mims is the manager of Total Customer Experience for HP. In this assignment, she leads efforts in utilizing quality focused methodologies to develop monthly and quarterly comprehensive reports which identify customer priorities across the Americas. Additionally, she is responsible for complaint management call centers located in Texas, Georgia, California, Idaho and Costa Rica. Kim recently transitioned a complaint management call center from the United States to Central America.

Improving the Customer Experience with a Virtual Call Center

McKesson Health Solutions has over 500 agents (Registered Nurses) in 6 physical locations throughout North America. Starting in late 2003, McKesson started a program of enabling its staff to work from home rather than having to drive into the call center. The program has been a huge success from a recruiting and retention point of view and turnover has dropped by 85%. In addition to this improvement, McKesson has been able to significantly reduce its operating expenses while improving morale and improving the environment. This session will cover the issues around transitioning from a brick & mortar model to a blended Virtual model using work at home and traditional call centers.

Topics of discussion will include:

- Increasing employee retention
- Reducing operating expenses
- Improving the morale of your contact center



Michael Modiz
Vice President of Operations & Strategic Projects
McKesson Health Solutions

Mr. Modiz oversees McKesson's North American clinical call center operations and a wide range of strategic projects for McKesson including activities related to Specialty Pharma, strategic partners and relationship management. McKesson runs multiple clinical call center operations in North America linked as a virtual network (Sacramento, Denver, Chicago, Jackson, Westlake & San Juan) and has expanded the virtual network to include at-home nurse and non-nurse agents.

10:40
Morning Break and Exhibit Viewing

11:10

Reducing Turnover and Absenteeism in Your Call Center to Create a More Productive Environment

Are agent turnover and absenteeism increasing your total operational expense? Are the costs of recruiting and training new agents skyrocketing? Do your agents feel like they are unfairly compensated for their efforts? Have you ever wondered what it would be like to have a self-motivated team of agents coming to work everyday? Come learn more about how Wyndham has addressed these challenges and others to increase productivity, and ultimately bookings, in its reservation centers.

Topics covered include:

- Recruiting and hiring the right agents
- Continually training and coaching the agents to succeed
- Implementing a compensation program to achieve desired results for your company and the agents
- Providing agents with daily metrics to measure their performance and compensation
- Implementing a continuous improvement program

**David Mussa
VP of Reservations
Wyndham International**

David Mussa serves as Vice President of Reservations for Wyndham Hotels and Resorts overseeing and managing the company's central reservations office and global distribution channel relationships and connectivity. David is also responsible for establishing and implementing integrated reservations processes and technologies throughout all Wyndham property reservations offices and regional call centers.

A Step-by-Step Guide to Measuring Customer Satisfaction

Nobody will dispute that measuring customer satisfaction is definitely a worthwhile task, but how do you gain the greatest value from your investment? Frito-Lay, Inc. utilizes a combination of in depth telephone interviews, coupled with a comprehensive mystery caller program, to document the contributions of its department and gain insight into what improvements will provide the greatest return. Furthermore, its customer satisfaction measurement process has provided a great tool for evaluating and motivating its representatives.

Learnings will include how Frito-Lay:

- Assigns an actual dollar value to its call center
- Evaluates the fulfillment it sends out to consumers
- Benchmarks its call center's performance against other prominent companies
- Gains insights into what improvements should be made based on direct customer feedback



**Cathy Dial
Director, Consumer Affairs
Frito-Lay, Inc.**

Cathy Dial has over 20 years of operations management experience in the field of customer care with Frito-Lay, Pepsi-Cola, Atari and Polaroid. Cathy joined Frito-Lay in 1995 and is Director of Consumer Affairs where she manages the consumer response contact center. The center has a staff of 50 customer care professionals handling over 500,00 consumer contacts annually.



**Richard Shapiro
President
The Center For Client Retention**

Richard is president and founder of The Center For Client Retention. He is a highly regarded leader in the areas of customer satisfaction and loyalty. His firm designs and conducts state-of-the-art satisfaction / loyalty measurement systems for numerous Fortune 500 companies.

Utilizing Workforce Management to Streamline Staffing in Your Call Center

This session will focus on the practical application of the workforce management tool in the MassMutual Financial Group Enterprise Shared Services Call Centers. You will hear how flexible scheduling can be used to optimize service delivery. Participants will also gain a greater understanding of the importance of linking their long-term planning into their real-time management of their operation.

In this session you will learn how to:

- Identify the value of a Workforce Management tool in capacity planning
- Identify how flexible scheduling creates efficiency and optimizes service levels
- Reduce operating costs by having people where and when you need them
- Foster associate awareness of their impact to the bigger picture
- Link long-term, short-term, and real-time forecasting into an effective game plan



**Debbie Cote
Director Retirement Services Call Center
MassMutual**

Debbie Cote is a Director of the Enterprise Shared Services Retirement Services Call Center at MassMutual Financial Group (MMFG). In this assignment, she is responsible for overseeing all aspects of the operation in this dynamic environment.

**Heath Durocher
Director Workforce Management Group
MassMutual Financial Group**

Heath Durocher is the Director of the Enterprise Shared Services Workforce Management Group at MassMutual Financial Group (MMFG). Heath is responsible for overseeing call forecasting, staffing and scheduling for the Life, Annuity, Disability, and Retirement Services Call Centers. The group also oversees the creation and administration of call metrics reporting vital to helping each business achieve its goals.

12:00
Awards Luncheon Presentation of



1:35

Increasing Productivity and Reducing Turnover Through Employee Satisfaction

Employee Satisfaction, or engagement, is a very easy concept to understand. The challenge is to get the organization to the point where the concepts are believed, internalized, and lived. Engagement is the average of the percent-favorable scores of the three say, stay, and serve questions.

These consist of:

- Say -Given the opportunity, I tell others the great things about working at this company
- Stay -It would take a lot to get me to leave the company
- Serve -I am inspired to do my best everyday

Topics of discussion will include:

- Maintaining credibility and trust in management
- Opening opportunities for growth, development, and career advancement
- Enjoyable day-to-day work, the impact it has, and how challenging and interesting it is
- Stronger relations with your supervisor/manager

**Kenneth L. Williams
Direct Sales Manager
Nationwide Insurance**

Ken Williams is a Direct Sales Manager for Nationwide Insurance's Lynchburg Customer Care Center. In this assignment, he leads a team of sales and service insurance agents. The call center takes inbound calls from existing policyholders as well as quoting and selling personal automobile insurance. Ken haws over 20 years of field sales and marketing experience.

Utilizing Six Sigma to Improve Performance and Efficiency in Your Call Center

Six Sigma is a business philosophy and process improvement methodology that employs a client-centric, fact-based approach to reduce process variation in order to dramatically improve client satisfaction, increase shareholder value and strengthen employee commitment. Participants will hear how Merrill Lynch has utilized the Six Sigma approach to identify opportunities to increase service quality and improve operating efficiencies. Participants will acquire best practices on new hire preparation as well as the importance of placing emphasis on call metric adherence to create an environment of performance excellence. Through the integration of Six Sigma into its business model, all participants will have the opportunity to build upon the client experience through improved new hire call metric statistics -duration resulting in the creation of cost efficiencies and empowered employees.



**Jannine P. Vitelli
Director, Financial Relationship Services
Merrill Lynch**

As Director of Merrill Lynch's Service Utility, Jannine Vitelli manages the 24 x 7 Hopewell location consisting of telephony and web enabled services through a multi-site service strategy. Financial Relationship Services handles approximately 15 million calls annually, via 1 800 MERRILL, on the firm's retail products and services.



**Greg Alex
Director, Six Sigma
Merrill Lynch**

Greg began his Merrill Lynch career in April 1993 upon receiving a BS degree in Marketing from the Pennsylvania State University. Throughout his tenure, Greg has held various positions in Marketing, Finance, Technology and Services. Prior to joining Six Sigma, Greg served as a manager for the Merrill Lynch Direct call center. In April 2001, he was selected to become a Six Sigma Black Belt and was promoted to Six Sigma Deployment Manager in November 2001 where he coordinated the launch of Six Sigma across Global Private Client.

Identifying Benefits of Utilizing Voice Recognition Technology in Your Contact Center

Health Net's call center receives 230,000 calls a month from its members and providers. In order to manage the volume of customer interactions and address strategic business goals of improving the bottom line, Health Net invested in speech recognition technology to improve operational efficiency in the call centers as well as provide outstanding nationwide customer service and security for members and providers. In this session you will learn about designing and implementing a speech enabled interactive voice response system that meets both member and provider requirements and specifications.

Topics of discussion will include:

- Factors to take into consideration when evaluating and deploying an IVR solution
- Processes used to link service focused business strategy with technology requirements
- ROI results Health Net achieved with its deployment of a speech-enabled IVR system



**Jean Sandler
Director of Call Center Systems Support
Health Net**

Jean oversees the call center functions of scheduling and forecasting of call center staff for the call centers. Also ensures the output of daily, weekly, monthly, quarterly, year to date and ad hoc ACD reporting. She is responsible for managing and maintaining the call center system technologies.



**Remus Siclovan
Senior Systems Analyst, Call Center Group
Health Net**

Remus Siclovan is Senior Systems Analyst in the Call Center Group at Health Net. Remus is responsible for the integration of Speech Enabled IVR applications for all Health Net Contact Center Sites and has over 8 years of contact center experience.

2:25

Ensuring Your Contact Center Technology Works for You, Not Against You – A Case Study on Anthem Blue Cross Blue Shield

Ideally, contact center technology should make customers happier and agents more productive. But in many contact centers, that's clearly not the case, as poorly designed or implemented systems actually slow service, frustrate customers and agents and increase operating costs. This case study session will highlight how Anthem Blue Cross Blue Shield uses voice application management to proactively identify, repair and avoid common technology issues that adversely affect contact center operations.

Participants will learn:

- The impact that IT problems can have on customers and agents in terms of customer satisfaction and lost revenue opportunities
- The causes of common IT issues, including slow screen pops and dropped, misrouted calls, or lack of self-service information
- Best practices for proactive prevention and early detection of technical issues before they become noticeable to customers
- How to leave with actionable advice on improving the end-to-end performance of your voice applications and contact center technology infrastructure and applications

Dick Curry
 Manager of Call Center Technologies
 Anthem Blue Cross Blue Shield



Nathan David
 Director - Product Management
 Contact Center Enterprise Group
 Empirix Inc.

Sponsored by:

Benchmarking the Customer Experience to Improve Service Quality

Selecting the right metrics, establishing goals and monitoring performance to improve service quality is a key to improving your call center and achieving goals. By attending this session, you will learn techniques and processes to improve customer service, leading to increased customer retention. By benchmarking your customer's experience you can improve the quality at which you are able to deliver to them.

Topics of discussion will include:

- Key metrics that drive better performance
- Linking key metrics to improve service quality
- Best practices for achieving the highest customer service levels



Beverly Mitchell
 Call Center Manager
 SunTrust Bank

Beverly Mitchell is a First Vice President with SunTrust Bank, Manager of the Atlanta Client Contact Center. She has twenty years of banking experience, and has spent the past 5 years with SunTrust's Contact Center management team. Beverly's experience includes contact center development and management, service quality/process improvement, retail/branch banking, marketing and communications and training and development. Beverly is also responsible for developing the process currently used by SunTrust to measure service quality from the customer's perspective.

Gaining Operational Efficiency and Improving Customer Satisfaction in Your Contact Center

It is more costly to persuade and convert a new customer than it is to retain an old customer. Are you doing everything possible in your contact center to maintain and increase customer satisfaction? Attend this session and Sprint will tell you how it has utilized operational efficiency to improve customer satisfaction in its contact center.

Participants will learn how to:

- Integrate technology to increase operational efficiency
- Create an efficient call center infrastructure
- Recognize that operational efficiency helps to improve customer satisfaction



Deb Brown
 Lead Architect
 Sprint

Deb Brown has 15 years call center experience and joined Sprint in 2000. In her current role as a lead Architect for Sprint, she is responsible for providing strategic technology direction and creating migration strategies for the internal contact center infrastructure. Prior to joining Sprint, Deb served as a Call Center Manager, System Design Engineer, Senior Voice Analyst and Senior Network Engineer.

3:05 End of Main Conference

DAY 3 WEDNESDAY June 29, 2005

CALL CENTER SITE TOURS

3:15PM – 5:45PM choose **G** or **H**

G Nevada Power Company Site Tour



Nevada Power Company has been serving Las Vegas since 1906 when the city was little more than a village at the end of a railroad line. Since Las Vegas is an international tourist destination with over 100,000 guestrooms, it becomes the fastest growing electric utility in the U.S. Its parent company, Sierra Pacific Resources, has call centers in Las Vegas and in Reno. The contact center in Las Vegas is open 24-hours a day, 7 days a week. With a staff of 150 agents, 2.3 million inbound calls are handled each year, along with fax and email requests. Nevada Power has implemented various call center tools and technology that has assisted them to reach new levels of customer service.

About Your Tour Facilitator:

Melissa Fernandez has been in the call center arena for 10+ years. She has worked her way up through the various levels of the call center organization. Experience as a representative and senior operations analyst, has prepared her to lead a team of 40 agents at **Nevada Power Company** for the past four years.

3:15PM – 5:45PM choose **G** or **H**

H Williams Sonoma Site Tour



Founded in 1956, Williams-Sonoma, Inc. is the leading specialty retailer of home furnishing in the United States. The eight brands are marketed through three channels - retail stores, catalog and the Internet. Three customer care centers, located in Las Vegas, Oklahoma City and Camp Hill, PA support the brands.

Las Vegas supports the PotteryBarn brand through catalog sales, service and e-commerce. It is the 24-hour center for all brands and handles approximately 4 million contacts with over 400+ employees. The center recently moved to a customer satisfaction survey to measure employee satisfaction, which has proven to be successful for associates and customers.

About Your Tour Facilitator:

Christina Berry is Director of the Williams-Sonoma, Inc. Care Center in Las Vegas, Nevada. She is responsible for managing 500 care center associates in a 24/7 center that supports the Pottery Barn catalog and internet site. She has worked at Williams-Sonoma, Inc for eight years. Prior to Williams-Sonoma, Christina worked for Pepsi-Cola for 6 years in their Consumer Affairs department in several locations including Irvine, California and Somers, New York. Christina holds a bachelor's degree from Cornell University.

6:00pm – Workshop Registration - Dinner will be served ↙

6:15PM – 9:15PM choose **I** or **J**

I Strategies for Improving and Maximizing Self-Service in Your Call Center

In this workshop, you will learn how to ensure the quality and performance of your voice and web self service applications. Learn expert strategies, methodologies and best practices that leverage comprehensive monitoring and testing techniques, including the fundamentals of proactive quality assurance including: load testing, monitoring and performance management. The workshop will cover quality and testing for Web applications, voice applications, call center technology and Voice Over IP infrastructure.

Participants will learn:

- How to gain a better understanding of what customers actually experience when using an organization's automated voice and Web applications
- Which metrics are most critical to measuring and managing
- How to utilize those metrics to create a better customer experience, and to foster better communication among development, quality assurance, operations and line-of-business teams.

6:15PM – 9:15PM choose **I** or **J**

J Building on the Lessons of the Leaders – Using the Experiences of Others to Accelerate Success

The benefits of benchmarking are endless and will greatly increase the successes of your organization. This session will focus on best practices in benchmarking as well as will teach you different types of benchmarking and what will work best for you. Participants will come away with learning how to create a culture of benchmarking and insight into the best ways to gain buy-in from your executives.

Topics of discussion will include:

- Benefits of benchmarking outside of your industry
- Role that benchmarking has to play a role in tools like six sigma
- Creating a culture of benchmarking within your organization
- Including colleagues from all parts of the organization to look at benchmarking together

Topics covered will include:

- Application benchmarking
- Performance testing
- Proactive production monitoring
- Service level agreements and service level management

About Your Workshop Leader:

Rob Edmondson is a **Senior Field Engineer** at **Empirix Inc.** Rob is an expert in automated testing of self-service applications, particularly in voice applications. Rob's extensive background includes two years as a technical support manager in a call center, followed by five years at Empirix in professional services and engineering. While at Empirix, Rob has performed pioneering work on testing methodologies for natural speech applications. Rob works directly with customers in their own environments, helping to design comprehensive testing strategies for their voice applications and infrastructures.

About Your Workshop Leader:

 **Theresa Esposto** is the **Manager**, Quality and Performance Forum and Global Benchmarking Council, at **Best Practices LLC**. Theresa is the account manager to Fortune 500 members of Best Practices' Quality and Performance Forum and Global Benchmarking Council. She advises clients on performance management, quality, process excellence, benchmarking, and Lean Sigma deployments. She also oversees the development of quarterly Global Benchmarking Council conferences that address key member issues and provide forums for information exchange.

7:30am – Workshop Registration Coffee/Tea ↙

8:00AM – 11:00AM choose **K** or **L**

K Achieving Performance Excellence in a Multi-Channel Call Center Environment

One of the biggest challenges facing call center management today is the effective integration of multiple customer contact channels. Customer contacts from multiple channels is placing new performance demands on every call center, creating enormous opportunities for increased self-service and closer customer relationships as well as increased revenues and decreased service costs.

This session outlines the major steps required to migrate to an effective multi-channel environment, using benchmarked best practices. Multi-channel customer contact requires a transition that includes new processes, tools, and systems. This session will focus on the major steps required to improve overall contact center performance in a multi-channel environment, using benchmarked best practices.

Key topics addressed will include:

- Assessing the organization's customer care strategy and evaluating opportunities for self care and multi-channel integration -identifying key customer satisfiers for each channel
- Defining performance metrics for each channel -weighing the opportunities for increased self-service, customer satisfaction as well as transaction savings and efficiencies
- Defining the strategic requirements and new processes for effective self-

service and multi-channel customer contact

- Evaluating the synergies and impacts of integrating multi-channel customer contact
- Optimizing staffing for each channel -defining agent performance metrics for each channel
- The enablers -contact center technology architecture - determining the technologies, functionality, and applications requirements for an integrated, multi-channel model
- Transitioning -the process of defining new tools, skill sets, and management systems required to effectively operate a multi-channel customer contact center

About Your Workshop Leader:

 **Lyn Kramer** is the **Managing Director & Partner of Kramer & Associates**, a firm she founded in 1988. As the leader in call center consulting, Kramer & Associates has been instrumental in helping companies respond to emerging challenges by developing comprehensive strategies and designing programs that integrate people, processes, and technology. She is responsible for project management and program design, having managed call/contact center projects involving consolidation, eBusiness integration, technology assessment, and process improvement for a number of Fortune 500 companies.

8:00AM – 11:00AM choose **K** or **L**

L A Step-by-Step Guide to Implementing Performance Metrics for Your Call Center

Few industries outside of Customer Service readily have as many critical key performance indicators (KPIs), that are easily available to perform a benchmark of where you are today and where you need to improve levels of satisfaction. Attendees first take a RealityCheck[®] of key indicators, directly related to external customer quality and internal quantity as reviewed on a Balanced Scorecard. In research led by Dr. Jon Anton, we will share 'how good is good enough' to build the strategy for key initiatives. Finally we go through a Discovery process to create an ROI-based findings and recommendations to enhance satisfaction by the agent, your business, and the caller.

Learning points:

- Strategic metrics: effective and efficient

- Why it's important to quantify your business strategy
- Linking measures to process improvement
- Best practice for customer satisfaction from centers of excellence

About Your Workshop Leader:



Dru Phelps, Vice President of Certification for **BenchmarkPortal**, conducts BenchmarkPortal's validation of Centers of Excellence. From her book *How to Conduct a Call Center Performance Audit: A to Z*, Dru shares pragmatic expertise in quality performance, assessment tools, and process assimilation. A distinguished graduate from Purdue University and Masters at USC, consultant, director, and speaker, Dru has been actively engaged in 180 Call Centers and educates at 30 events annually.

11:00am – Workshop Registration – Luncheon will be served ↙

11:15AM – 2:15PM choose **M** or **N**

M Raising the Bar on Performance: Achieving Excellence Through Calibration, Coaching and Performance Management

Alright– you have systems in place and you're doing a fine job. How do you push the bar higher? You don't. Your agents do. They are ready to do the heavy lifting now. And will they do it? That depends on the incentives, the feedback system, and the culture of the center. Most good agents act like good renters– we like them because they are profitable and problem-free. How many agents, though, act like owners? Not only are owners profitable and problem-free, but they find ways to generate even more profit – by raising the bar.

This interactive workshop will teach you how to:

- Recognize entrepreneurial behavior
- Take existing behavior and raise the bar
- Create an entrepreneurial culture in the center

Topics covered include:

- Strategic Planning for enabling entrepreneurial behavior
- Tactical details of big-bang-for-the-buck tools
- Implementation of entrepreneurial culture
- Voice of the customer strategies
- Six Sigma tools for raising the bar
- Fact-based management and its consequences– legal and performance outcomes

About Your Workshop Leaders:



Mark G. Haug, Ph.D., J.D., is a **Principal** of **Oread Consulting Group, LLC**. His consulting engagements have included Business Process Modeling, Risk Analysis and Risk Management, Incentive Plan Design, Capacity Planning and Aggregate Planning for Call Centers, Loan Survival Analysis, Recovery and Valuation Models, Simulation Studies, Market Research, and Fraud Detection Systems. Haug earned his doctoral degree in Research and Evaluation Methodology from the University of Colorado and his law degree from the University of Kansas. He is on the faculty of the University of Kansas School of Business. He has earned two University-wide and three School of Business teaching distinctions in his five years at KU.



Rich Pusateri is a **Vice President** of **Insight Management Consultants**. Mr. Pusateri leads the Customer Experience Management practice with a focus on assisting clients with contact center optimization, sales process improvement and automation, marketing analytics, and customer experience strategy design.

11:15AM – 2:15PM choose **M** or **N**

N Designing and Implementing a Customer Interaction Model: Tools & Techniques to Manage Offshore and Outsource Operations

While the financial benefits of putting call centers to places like India and the Philippines are compelling, they must not come at the expense of negatively impacting customer experience. As customers everywhere expect in-culture interaction, the failure rate of offshore customer service operations remains high. As it turns out, the importance of creating competitive advantage through customer experience has not diminished in the age of outsourcing. With the aim to offer a more balanced and informed approach to managing your global customer service infrastructure, this workshop reveals that the key to success goes well beyond accent neutralization training. Participants will explore the cross-cultural aspects of customer experience by applying practical tools and techniques to agent-customer interaction scenarios. It is a back-to-basics interaction model in the nature of human communication, offering managers and executives a framework for analyzing the process of creating a consistent and positive customer experience.

Participants will learn:

- Important aspects of the global business pressures that influence the contradictory forces of cost reduction and customer experience
- How customer expectations differ from culture to culture and how you can adapt meet and exceed those expectations
- Common flaws and assumptions in calculating the cost of moving customer service operations abroad

- A micro-analysis of the causes and the consequences of miscommunication between agents and customers, including intriguing examples and an opportunity to share experiences with colleagues.
- How the medium of interaction impacts the agent's ability to effectively evoke the intended meaning of what is being communicated
- Key ingredients to manage outsourced operations on an ongoing basis
- The manager's role in motivating the expressions of agents with the culture-specific expectations of customers
- How to leverage proven training and coaching techniques in culturally appropriate ways to improve opportunities for success
- A framework for analyzing your performance

About Your Workshop Leaders:



Erik Granerod is a **Consultant** at **Corporate University Enterprise, Inc.**, an educational consulting firm in Falls Church, Virginia. Erik's new book *Global Call Centers: Achieving Outstanding Customer Service Across Cultures and Time Zones*, (Nicholas Brealey, 2005) offers a compelling perspective on the industry. The book has already received ringing endorsements from industry experts and academics alike. Erik has rich international experience in organizational communication, customer service, management training, and marketing communications. His expertise includes cross-cultural variables in leveraging strategic learning in large, diverse, dispersed organizations.

SPEAKER FACULTY & COMPANY BACKGROUND DETAILS

Caterpillar

Maturity of the Call Center in years:

Start-Up

Functions included in the Call Center:

Customer Service and Collections for unsecured Private Label Credit Card

History of the Call Center

Start-up call center and has been in the planning stages for a little over a year. Initial primary customer service and under 90 day collections will be outsourced to EDS.

Number of Call Center Locations:

One

Are you Global or National?

National

Top 3 Challenges:

1. Development of Customer Service Structure
2. Since this is a start-up, no historical information to formulate staffing & volume projections
3. Partnering with an Outsourcer

Brief History on the Experience with Call Centers:

Michael has 22 years of experience in the call center and customer service industry, and has worked in these areas for MBNA, Progressive Insurance Company, UST, Norrell, PricewaterhouseCoopers, Staffmark, Sykes and Caterpillar Financial.

Michael R. Maffei, BSBA, Eugene W. Stetson

School of Business & Economics, Mercer University, Macon Georgia

Manager, Caterpillar AccessAccount Customer Service

Caterpillar Financial

Cinergy

Maturity of the Call Center in years:

A total of 12 years with both centers handling emergency trouble and customer service inquiries

Functions included in the Call Center:

Cinergy call centers handle inbound customer billing inquiries, electric and gas service orders, gas and electric trouble and any non emergency type work such as an inspection of the customers' service, light pilot light on their furnace etc.

History of the Call Center

Cinergy was formed in 1995 through a merger of the Cincinnati Gas and Electric Company (CG&E) and Public Service of Indiana (PSI). The call centers have functioned as an East (CG&E) and West (PSI) Call center since this time.

In 2000, its Online Services was launched allowing customers to retrieve account information, request service and electronic bill payment directly into the back office system.

In 2002 an IVR with back office functionality was implemented.

In 2002 Credit calls for the East center were outsourced.

In 2002 East Turn On / Off Service Requests were moved to the West call center.

Number of Call Center Locations:

2

Are you Global or National?

National (actually regional)

Top 3 Challenges:

1. Reducing Call Volume
2. Maintaining/ Increasing Customer satisfaction
3. CSR Turnover

Top Successes:

1. December 2004, the two call centers earned the distinction of being the first utility call centers to achieve J.D. Powers Certification of Excellence.
2. Recognized as a CIAC Pacesetter- 4 staff members

have currently been certified in the field of Call Center Management.

3. 2003 ICMI Global Call Center Manager of the Year Award
4. Successfully implemented CMSi-a user friendly point and click front end to the Customer Management System.

Management Structure:

General Manager- Customer Contact Services

Managers- East and West Call Centers

Manager- Customer Contact Support

Supervisory staff- responsible for front-line customer service representatives

Brief History on the Experience with Call Centers:

Through 22 years of experience at Cinergy, John has worked either directly or indirectly with the call center. In the early years he worked as a call center rep taking calls regarding electric trouble and new service. He has also worked indirectly with the Credit department and billing department handling elevated calls regarding incorrect bills, security deposits, returned checks etc. Over the past 9 years he has managed customer satisfaction and worked with the call center to set realistic, controllable and measurable goals. He has also analyzed customer survey data to provide recommendations and process improvements for the call center.

John W. Kappesser

Customer Care Services / Senior Analyst

Cinergy

Colonial Penn Life Insurance Company

Maturity of the Call Center in years:

Colonial Penn Life Insurance Company's Call Center has been providing sales opportunities and outstanding service to its customers for the past 45 years. The average tenure of its call center CSRs is 5 years and with management a tenure of 16 years is the average.

Functions included in the Call Center:

- An Inbound and outbound, sales and customer service call center.
- 175 CSR PC workstations with software supporting scripting, cross-sell, up-sell and referral requests.
- Comprehensive metric reporting and tracking system
- Predictive dialing system
- Digital recording system with screen capture
- E-Business communication function

History of the Call Center

Colonial Penn Life Insurance Company, located in the historic Old City section of Philadelphia, Pennsylvania, was founded in the mid 1950's. Today, Colonial Penn is one of the leaders in the direct sale of life insurance geared to the senior market. The company continues to expand its market by developing new products and services to support the growing senior market. Today, Colonial Penn's customer service team is unique in their ability to cross-sell, up-sell and obtain referrals from its customers, representing over 10% of their new annual premium. In 2002, Colonial Penn became a part of the Bankers Life & Casualty Company, Bankers, established in 1879, is today one of the largest and most respected insurance companies in the United States. Both Colonial Penn and Bankers Life companies are part of the Conesco Company, headquartered in Carmel, Indiana.

Number of Call Center Locations:

Two, Philadelphia and Jamaica

Are you Global or National?

National

Top 3 Challenges:

1. Recruiting and retaining best candidates. Matching CSR's skill sets to optimal calling channel

2. Continuing to motivate and improve employee morale
3. Continuing to raise the CSR's skills level by performing needs analysis within the call center, and providing timely training opportunities

Top 3 Successes:

1. 2004 rated "Best Practices" by The Gallup Organization in the financial services industry
2. Fully engaged sales and management team
3. 1998 rated "Call Center of the Year" by Call Center Magazine

Management Structure:

Glen reports directly to the Vice President of Operations, and currently supervises 2 managers, 7 supervisors, 7 Team Leaders, and 130 Life and Health Insurance licensed sales agents within the call center.

Brief History on the Experience with Call Centers:

Glyn has over fifteen years experience in life and health insurance telemarketing, and servicing customers in a call center environment. He has spent the past 14 years managing inbound and outbound sales and service calls within the call center. He is well versed in telemarketing sales techniques, writing sales scripts, budgeting, setting forecasts, training, developing motivational incentive programs, and managing to department efficiencies, productivity, and quality goals.

Glyn D. Edwards, FLMI, ACS,

MBA Candidate at the University of Delaware

Assistant Vice President

Life/Health Sales & Service

Colonial Penn Life Insurance Company

Dow Jones

Maturity of the Call Center in years:

The contact center has been in existence for more than 20 years.

Functions included in the Call Center:

Customer service via calls, email, and paper mail. Support functions that include telephony, workforce management, reporting and analysis, training, and quality.

History of the Call Center

The contact center has grown from a traditional call center into a multi-media contact center. Future plans are to integrate web business support and to create a virtual front door for all contacts across the enterprise.

Number of Call Center Locations:

Two internal and one outsourced location.

Are you Global or National?

Global

Top 3 Challenges:

- transforming from a service-only orientation to a sales and service orientation
- integrating into a growing internet subscriber customer base
- reaching end-of-life on several technology platforms

Top 3 Successes:

1. very well-focused on pleasing the customer and designing solutions to meet those needs
2. matching the workforce from a skills perspective to meet customer needs
3. a strong technical knowledge across the supervisor role

Management Structure:

The Contact Center Director reports to the VP of Circulation and has as direct reports an Contact Center Manager, an Operations Manager, and a Manager of Training and Quality. Supervisors report to the Contact Center Manager and have a span of control of approximately 12 CSR's.

Brief History on the Experience with Call Centers:

Tom has been involved with contact centers for over 10 years. In that time he has been responsible for day-to-day performance as well as business and

technology strategy and the workforce management, training, quality, customer relationship, and human resources functions.

Tom Dubay
Contact Center Director
Dow Jones & Company

JP Morgan

Maturity of the Call Center in years:
 15+ years

Functions included in the Call Centers:
 Credit Card inbound servicing and cross-selling, outbound telesales, customer retention, dispute by phone as well as correspondence and dispute processing.

History of the Call Center:
 Just completed recent JP Morgan Chase/Bank One merger in 2004; previous merger between Bank One and First USA Bank completed in 1998.

Number of Call Center Locations:
 9

Are you Global or National?
 Global

Top Challenges:

1. Complete full, post-merger integration of JP Morgan Chase and Bank One processes & systems.
2. Transition to in-house credit card processing system (from FDR to TSYS).
3. Delivery on planned merger saves.

Top 3 Successes:

1. Established a Performance-driven culture with clear-accountability at all levels.
2. Achieved sustained improvement in operations efficiency, customer satisfaction, & employee satisfaction.
3. Successfully completed large merger and 2 system conversions in the same year.

Brief History on the Experience with Call Centers:
 9 years of call center experience in Performance Improvement and Business Engineering.

David W. Harris
M.S. in Operations Research; M.S. in Systems Management
Vice President
JP Morgan Chase

MassMutual Financial Group

Maturity of the Call Center in years:
 MassMutual has had dedicated Call Center groups in place since the late 80's.

Functions included in the Call Center:
 MassMutual's Enterprise Shared Services Service Centers are comprised of four lines of business; Life, Annuity, Disability Income and Retirement Services. The Life, Annuity, and DI Service Centers provide service and support to its customers and producers including transactional processing and general policy/contract information. The Retirement Services Participant Information Center provides service and support to 401k and pension plan participants.

History of the Call Center
 The original call center provided support to Life, Annuity, and Disability Income customers. In the late 90's, the business skills were separated to improve quality and service delivery. The groups operated independently under different organizations. In 2000, the three groups were reorganized under the same organization to ensure a consistent customer experience. The Retirement Services Group was added to this organizational framework in 2004.

Number of Call Center Locations:
 Three

Are you Global or National?
 National

Top 3 Challenges:

1. Providing a consistent customer service experience while respecting the uniqueness of each line of business
2. Cross-training; technology moves faster than training
3. Reducing costs, in an evermore-demanding service environment

Top 3 Successes:

1. Ability to meet service expectations while reducing staff
2. Increase customer satisfaction
3. Leveraging cross training as career path

Management Structure:
 Each line of business' call center has independent staff and front line management reporting up to a site leader. The site leaders report to one call center department head. The department head has dotted line accountability to the heads of each line of business.

Brief History on the Experience with Call Centers:
 Debbie Cote has been in and around call centers for 16 years. She began her career with MassMutual in 2001 with the Life Insurance line of business. In 2003 she assumed responsibility for the Retirement Services call center.

Heath Durocher has worked with the Life and Disability Service Centers in different capacities since 1996. In 2003, Heath took over the Workforce Management Group and has overseen the implementation of a new workforce management tool.

Debbie Cote
Heath Durocher
Director, Retirement Services Call Center
Heath Durocher - Director, Workforce Management
MassMutual Financial Group

Merrill Lynch

Maturity of the Call Center in years:
 15-20 years

Functions included in the Call Center:
 Banking and brokerage account information (institutional and individual clients), service to sales, account opening and post sales support

History of the Call Center
 Over time and with experience, focus on our service offering has evolved from meeting client needs and expectations to taking it to the next level to exceed expectations. Listening to the voice of our clients over the past 5 years, our team has successfully simplified access to data and information for clients and has supported providing a choice of channel for clients to access their account information and services (phone, interactive voice response, web, human being).

In our on-going mission to add value to our client relationships and the Firm, targeted focus has been placed on developing service to sales strategies and client retention initiatives while continuing to improve upon our technology platform. Developing these components empower our contact center associates to proactively identify service opportunities for clients that will offer convenience within their

lifestyle preferences, provide education on Merrill Lynch products and services and help us to build upon the future of client relationships today.

Number of Call Center Locations:
 2 - Jacksonville, Florida and Hopewell, New Jersey

Are you Global or National?
 Domestically based and do support ML international clients for specific information.

Top 3 Challenges:
 Representative Retention - Recognition, Training and Career Progression models have helped to address this common call center industry issue.

Multi-Site Contact Center Organization - A clearly defined communication strategy and organizational hierarchy has assisted to support a successful virtual contact center strategy.

Industry/Market Changes - A dedicated Work Force Management Team and Forecasting methodology enable the team to quickly and efficiently mobilize necessary resources to support call volume needs associated with Market trends.

Top 3 Successes:

1. Client Satisfaction
2. Best in Class Technology
3. Integrated Training Model

Jannine P. Vitelli
Greg Allex, Director, Six Sigma
Merrill Lynch

Nationwide

Maturity of the Call Center in years:
 Five years

Functions included in the Call Center:
 Primarily inbound sales for personal automobile insurance and service of existing personal insurance including auto and homeowner. In addition we also have an outbound centralized marketing unit.

History of the Call Center
 In 2001 began as a 25 CSR inbound call center servicing five states. Since then it has grown to over 150 CSRs providing sales and service to a 25-state region.

Number of Call Center Locations:
 Three sales and service call centers in Amarillo, Texas, Portland, Oregon, and Lynchburg, Virginia.

Are you Global or National?
 National

Top 3 Challenges:

1. Training
2. Recruiting
3. Keeping pace with call volume

Top 3 Successes:

1. Very low turnover of less than 4%
2. Engaged workforce
3. Growth

Management Structure:
 A Vice President, based in the home office, leads the three call centers. A call center director then leads each call center. Under the call center director are team supervisors who lead teams of 15 CSRs.

Brief History on the Experience with Call Centers:
 Kenneth came to the Lynchburg Call Center after spending a year and a half in technology field support. He has been a manager since January of 2003 in this operation.

Kenneth L. Williams, MBA, MS MIT
Direct Sales Manager
Nationwide Insurance

Travelocity

Maturity of the Call Center in years:

Travelocity.com was established nine years ago, in March 1996

Functions included in the Call Center:

- Front office teams managing inbound sales and service contacts
- Mid and back office teams managing fulfillment processes
- Support and specialty functions, including customer relations, and quality assurance

History of the Call Center

Travelocity.com was established in March 1996. In 2000, Sabre Holdings merged Travelocity.com, then a subsidiary, with Preview Travel, an independent publicly traded company engaged in consumer direct travel distribution over the Internet. At that time, Sabre Holdings retained about 70 percent ownership in the combined company. In April 2002, Sabre Holdings completed a cash tender offer for the outstanding publicly held common shares of

Travelocity.com that it didn't already own. Following this transaction, Travelocity became a wholly owned subsidiary of Sabre Holdings.

Number of Call Center Locations:

- San Antonio, Texas (450 team members)
- Plains, Pennsylvania (225 team members)
- Irving, Texas (100 team members)
- Chesapeake, Virginia (60 team members)*
- Mumbai and Pune, India (1,000 team members)*
- Partner locations

Are you Global or National?

Global

Top 3 Challenges:

1. Customer championship (including agent empowerment and incident management)
2. Conversion from a service-centric to a sales-centric organization (domestically)
3. Best practice process improvement

Top 3 Successes:

1. Efficient and effective operations
2. Global enterprise perspective
3. Customer focus

Management Structure:

- Southlake, Texas executive management team, including enterprise operations, training, process management, product analysis and strategic planning
- Contact center management teams, including general management, local operations, recruiting, and quality assurance

Brief History on the Experience with Call Centers:

Mark Weiner - 18 months with Travelocity's Sales and Customer Care organization. See bio for more information

Lesley Harris - 6 months with Travelocity's Sales and Customer Care organization. 3+ years with Sabre Travel Network's contact centers (in various capacities). See bio for more info

Mark Weiner

Vice President, Travelocity SCC Business Development

Travelocity

Lesley Harris

Vice President, Travelocity Sales and Customer Care
Travelocity

CALL CENTER WEEK 2005

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The Society of Workforce Planning Professionals (SWPP) is an organization devoted to facilitating education and networking opportunities among workforce planners across all industries.

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CCNG is the leading industry advocate for call center managers -- providing programs on a local, regional, national and virtual basis. CCNG members are motivated call center management and industry professionals dedicated to sharing working knowledge and best practice strategies for the advancement of call center operations and call center professionals. CCNG members learn to develop and implement sustainable improvements in agent performance, grow as a call center professional, and expand their contribution across their organization and throughout the industry.

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