



2nd Annual

CALL CENTER

Performance, Productivity & Metrics

Building Enterprise Value by Aligning Strategy with Operational Excellence

September 30-October 3, 2013 • Dallas/Addison Marriott Quorum
by the Galleria, Dallas, TX • www.callcentermetricsevent.com

Back by Popular Demand! Call Center PP&M will provide an inside look at the top strategies for delivering business results by aligning strategy with operational performance. Learn best practices for taking charge of call center process optimization, align with executive level imperatives AND deliver business results.

This event will help identify what metrics matter most to your organization, your call center employees, and most importantly, your customers.

"Corporate leadership says the contact center must deliver great service and drive revenue." **Contact Center Pipeline**

FEATURED SESSIONS

KEYNOTE: Understanding Business Priorities and Aligning with Business Imperatives



Brian Kieley
Global Head of Client Support Services
Visa

KEYNOTE: Creating a Closed Loop Customer Feedback System



Jamie Morin
Senior Vice President
Wex Inc.

KEYNOTE: Metrics that Matter



Lynn O'Neill
Corporate Vice President
New York Life

KEYNOTE: Winning Coaching Strategies



Stephen Riddell
Chief Operation Officer
Blinds.com

KEYNOTE: Leadership's Role in Driving Culture



Steve Ellis
Senior Director
EyeMed Vision Care

KEYNOTE: Why Customer Experience is a Top Priority



Andrew Murphy
Chief Operating Officer and Chief Information Officer
Mosaic Management Group, Inc.

KEYNOTE: Implementing an Emerging Leader Program



Dawn Nesvig
Vice President of Sales
Hotze Health and Wellness

ADDITIONAL PRESENTERS



Toni Jones
Social Media Director
U-Haul



Alicia Sweatt
Director Customer Care, Club Services
Bluegreen



Joe Arsenaul
Senior Manager
Time Warner Cable



Judy Brown
Manager, Member Services
American Airlines



Frank Burhance
Customer Service Director
Shutterstock



Lynn Holmgren
VP Residential Call Centers
Frontier Communications



Patrick O'Shea
Director of Acquisition & Retention
TXU Energy



Susan Wolski
Customer Operations Manager; Performance & Workforce Management
TXU Energy

AND MORE!

WHAT'S NEW?

- Concurrent breakout sessions: STRATEGIC MANAGEMENT AND OPERATING MANAGEMENT
- Expanded speaker faculty from diverse industries covering today's cutting edge topics
- Expo hall staffed by industry experts and solution providers
- Site tour at New York Life
- Keynote speakers covering big picture, strategic topics
- Focus Day on Leadership/Coaching Strategies for Achieving Excellence

KEY BENEFITS OF ATTENDING

Learn how leading companies are:

- Focusing on metrics that enhance customer experience or profitability
- Meeting organizational goals by aligning business strategy with performance
- Implementing an integrated, measurable social customer care strategy
- Creating a closed loop customer feedback system that generates business intelligence
- Employing analytics to maximize performance and create a well balanced scorecard
- Implementing strategies to drive sales and service teams to achieve some of their highest metrics
- Measuring the performance of outsourced vendors
- Employing measurement results as an internal tool for coaching and development

MEDIA PARTNERS

SALES and SERVICE NEWS





2nd Annual

CALL CENTER

Performance, Productivity & Metrics

September 30-October 3, 2013 • Dallas/Addison Marriott Quorum by the Galleria, Dallas, TX • www.callcentermetricseven.com

Dear Executive:

More and more, we're finding that executive leadership wants to know what's working and what's not, and how to take customer experience to the next level.

DELIVERING BUSINESS RESULTS

Call Center PP&M will provide an inside look at the top strategies for delivering business results by aligning strategy with operational performance. Gone are the days of simply answering phone calls! Find out how to align with key business imperatives including: revenue growth, cost reduction, customer experience/retention and competitive positioning,

STRATEGIC APPROACH TO MEASUREMENTS

There's no point in measuring for measuring's sake alone. This event takes a strategic approach to measurements – by focusing on the metrics we're actually going to use in the present or future. If your measurements don't enhance employee productivity, customer service or profitability – should you throw them out the window?! Don't miss this opportunity to learn strategies for focusing on the customer-facing metrics that will lead to competitive advantage.

BUSINESS INTELLIGENCE

Internal customers are relying on the business intelligence coming out of the contact center. It's imperative that we understand business priorities and align with internal executive imperatives. This event will provide the tools and insight needed to deliver results by aligning strategy with operational performance.

IMPLEMENT THE "RIGHT" METRICS

In our era of multi-skilled agents, traditional measurement tools in and of themselves are now outdated. Speed of call and AHT (Average Handle Time) were okay for transactional calls. However, we're now handling more complex inquiries and shifting from transactional centers to relationship centers. Welcome to our new world of coaching for excellence and measuring performance. Don't miss our Leadership/Culture focus day designed for all executives aiming to take their team and operation to a higher level of performance.

"Two Heads are better than One"

This innovative event will provide an interactive, collaborative environment! As customer focused executives, we are faced with a number of challenges and opportunities. But, no individual has all the answers or a crystal ball to the future of call centers. That is why we're here. As a collective group, we are bringing our "brain power" to the room.

This event will provide actionable insights into:

- *Linking performance improvement metrics to all levels of the company*
- *Focusing on the metrics that enhance customer experience or profitability*
- *Creating a feedback system that works*
- *Measuring for competitive success by focusing on customer-facing metrics*
- *Building enterprise value by measuring and quantifying performance*
- *Creating a roadmap that guides your team on big data implementation strategies*
- *New approaches for motivating and measuring people performance*
- *Leveraging social media and live chat to reduce transactional calls and focus on more strategic customer communications*
- *Employing analytics to maximize performance and create a well balanced scorecard*

Walk away with concrete strategies for **Taking Call Center Performance and Productivity to the Next Level**. Don't miss this opportunity to benchmark the **latest and greatest contact center metrics focused on: service, quality, efficiency, profitability, and employee development**.

I look forward to seeing you in Dallas!

Sincerely,

Lisa Schulman, Executive Producer
Head of North American Call Center Portfolio
Customer Management IQ



Customer Management 
a division of IQPC

Customer Management IQ leverages data, intelligence and networking from our global community of more than 50,000 customer management professionals to keep you ahead of the curve — and your competition.

This IQPC division that has spent decades delivering the most valuable call center, customer experience and marketing conferences is now a 24/7/365 resource that keeps you continually connected to actionable insights for getting closer to your customer. Tapping into our team's decades of experience, our contributor network of influential customer management practitioners who best understand your challenges and the findings of our proprietary research division, Customer Management IQ develops sector-leading executive briefings, whitepapers, case studies, training materials, how-to guides, news, commentaries, podcasts, webinars and virtual events.

Join the free Customer Management IQ to network with the world's most driven customer management professionals as you access this endless assortment of game-changing content.

To join visit, www.customermanagementiq.com

Sponsoring & Exhibiting Opportunities

Sponsoring and Exhibiting are excellent opportunities for your company to showcase its products and services to high-level, targeted decision makers. IQPC helps companies like yours achieve important sales, marketing, and branding objectives by setting aside a limited number of event sponsorship and exhibition space - all of which are tailored to assist a platform to maximize your exposure at the event!

For more information on sponsoring or exhibiting, please **Simon Copcutt** at spex@iqpc.com or call **1-212-885-2771**.



LEADERSHIP/COACHING STRATEGIES FOR ACHIEVING EXCELLENCE

Yes, it's true. IQPC's September Call Center PPP&M has a strong focus on business results. We explore taking charge of call center process optimization, aligning with executive level imperatives AND delivering business results. But, let's not forget about the crux of our business – our people. Don't miss this focus day on leadership and coaching strategies. Plus, there IS a direct link between employee engagement, productivity, customer experience and profitability. According to blogger Ryan Estis, "Put people first...connect them to each other and your higher purpose. Performance and profits will follow."

Sign up for our hands-on interactive focus day featuring some of the most admired leaders in the industry and get a head start on your learning experience. This full day Focus Day will focus on strategies for coaching your team to provide world class results. Very often boosting productivity comes at the expense of job satisfaction and entails longer hours and more responsibilities. Find out how to concentrate on skill development and coach your way to world class excellence. Drive your own personal and professional development and gain instrumental strategies for creating positive business results..

9:00 Registration and morning Coffee

9:30 KICK-OFF KEYNOTE Driving Continuous Improvement with the Front Line



Lynn Holmgren
VP Residential Call Centers
Frontier Communications

"In 2005, Toyota received more than 540,000 improvement ideas from its employees, improving the bottom line by over \$1 billion dollars" Gary Hamel, The Future of Management

Lynn Holmgren oversees 16 call centers staffed by 1700 frontline "consultants." A culture focused on continuous improvement has a great impact on customer satisfaction, quality, employee engagement and business performance. Discover how to put formal processes in place to elicit employee feedback on an ongoing basis.

- Empowering agents to problem solve and seek opportunities to improve customer experience
- Emphasizing "ownership" of customer experience
- Teaching people to embrace change
- Increase employee morale and foster feedback by creating an environment where employees are encouraged to challenge the status quo!

10:30 Mid-Morning Refreshments

11:00 Emerging Leader Program – Coaching and Growing your Team for Ongoing Success



Dawn Nesvig
Vice President Sales
Hotze Health and Wellness

Hotze Health and Wellness is a unique Health and Wellness Center with a natural approached wellness center, pharmacy and vitamin store. In this session, we will hear about an emerging leader program that that both engages employees and prepares them for future opportunities.

- Executing a practical talent roadmap for assessment and planning
- Addressing success planning challenges
- Focusing on competencies rather than compliance
- Engaging employees in their own career development plans
- Empowering people through self discovery
- Boosting productivity, engagement and results

Find out how to identify the leadership competency that accelerates talent development and growth in an evolving organization.

12:00 Luncheon for Delegates and Speakers

1:00 Creating a Culture Inspiring Excellence and Driving Results

Find out how to create a culture that engages employees, focuses on the customer experience, and fulfills the company's mission. Every employee can be a customer experience champion!

- Setting the vision to drive your call center to world-class excellence: Creating a Voice of the Customer culture
- Engaging other internal departments to enhance your customer's experience and deflect unwarranted calls

Walk away with strategies for realizing measurable benefits from an employee focused program including: improved attendance rates, reduced turnover, enhanced productivity and increased employee referrals.

2:00 Mid-Afternoon Refreshment Break

2:15 Why You Should Be Fired: A Conversation with Senior Executives - (Learn Strategies for Staying Gainfully Employed and Adding Value)



Jeremiah Jones
Senior Executive Fellow
Harvard University's John F. Kennedy School of Government
Former Chief Strategy Officer for White House Interagency Office

At a time when the nation's debt is crippling business operations, poor or inadequate Corporate Executive Leadership and Management is on a steady incline. Some companies are on its 2nd or 3rd CEO within 36 months.

Leaders are failing to evaluate and connect leadership style with the impact to employee performance, which results in the loss of intellectual property and your competitive advantage! In the first of a three-part series, Mr. Jeremiah Jones, the Former Chief Strategy Officer for a major White House Interagency Office, leads an interactive discussion with senior executives titled Why You Should Be Fired: A Conversation with Senior Executives, which is designed to help senior executives and managers achieve optimal organizational and employee performance. In this discussion, Mr. Jones shares common and not so common mistakes senior executives and shares a framework for addressing and improving. From this discussion, senior executives and managers will learn how to:

- Align and develop employee, customer and organizationally focused business strategies
- Balance call center's speed, quality, and standardization to optimize processes
- Engage, nurture and improve relationships with employees

This is sure to be a little controversial but insightful on how achieving call center excellence starts with and in some cases, ends with senior executives. Attend this human capital focused session and walk away with the insight needed to assess your own work behavior and leadership style as well as its impact on performance.

3:15 Getting Extraordinary Results from Ordinary People



Marilyn Elledge
Former SVP, Volunteer and Donor Care at **ALSAC/St Jude Children's Research Hospital**

To lead successfully, you must be a strategic thinker, a persuasive communicator, and driven to achieve positive results. You must also be able to get extraordinary achievement out of ordinary people. What doesn't require a lot of money? What does require consistency, commitment, sincerity, and execution? What gives you amazing results? Praise! Praise Pays!

Our distinguished speaker has 30 years experience at St Jude's Children's Research Hospital, overseeing 3 large in-house centers with 300 agents and 5 outsourced centers with 4200 agents. In this session, discover new strategies for letting people - employees and even customers - know they're important and appreciated. Discover the link between praise, performance and business results.

4:15 TEAM CHALLENGE

The last half hour of this focus day will feature a team challenge where attendees will break into teams and apply the leadership building skills they just learned to their own business. Get ready to roll up your sleeves in the last power hour where you put ideas into practices

4:45 Social and networking event



7:15 **Registration & Morning Coffee**

8:00 **Chairperson's Opening Remarks**

8:30 **KEYNOTE: Understanding Business Priorities and Aligning with Internal Executive Imperatives**



Brian Kieley
Global Head of Client Support Services
Visa

Brian Kieley is the Global Head of Client Support Services for Visa Inc. leading client implementation and support services, franchise management, CyberSource merchant services, and Global Customer Care Services. Some executives may not focus on service – until something goes wrong. But, more and more, we're finding that executive leadership wants to know what's working and what's not, and how to take customer experience to the next level. This engaging keynote will arm you with the tools and insight needed to deliver results by aligning strategy with operational performance.

- Delivering results by focusing on top business imperatives
 - Aligning initiatives with the needs of internal stakeholders
 - Understanding what's keeping your C Suite up at night
- Walk away with strategies for aligning with key business imperatives including: revenue growth, cost reduction, customer experience/retention and competitive positioning.

9:15 **Morning Networking Break**

10:00 **KEYNOTE: C LEVEL SESSION - Why Customer Experience and Productivity are my Top Business Priorities**



Andrew Murphy
Chief Operating Officer and Chief Information Officer
Mosaic Management Group, Inc.

Mosaic Management Group, Inc. is a specialized financial services organization engaged in the design, creation, support and maintenance of life settlement portfolios for sophisticated investors. The global company has selling agents in 36 countries and a Costa Rica based call centers that is both b to b and b to c handling client service and agent support. We are all well aware of the importance of customer retention; however, in Mosaic's case it is mission critical as the company sells reinvestment products. In 2011, the company

invested in technology and productivity to resolve customer interface challenges and keep customers happy and reinvested. This C level session will share strategies that led to a 44% growth in only the first quarter of implementation.

- Leveraging technology to reduce employee error
- Shortening customer response times
- Improving access to information flow and client data

Our distinguished presenter, who views customer service and productivity as "fuel" to the business, will share new ideas for self service, productivity, customer retention and involvement.

10:45 **Moderated Roundtables - Back by popular demand!**



Bruce L. Belfiore
Senior Research Executive & CEO
BenchmarkPortal

Our peer-to-peer roundtable sessions are designed to provide an open forum to discuss your challenges and potential solutions. The roundtables are also an excellent way to develop networking contacts

Marrying Metrics to Best Practices: Let's Talk Measuring for Success

11:45 **KEYNOTE: Measuring for Competitive Success: The Metrics that Matter**



Lynn O'Neill
Corporate Vice President
New York Life

There's no point in measuring metrics just to collect data - if you can't turn the information into actionable strategies. This keynote will take a strategic approach to measurements – by focusing only on the Key Performance Indicators (KPI) we're actually going to use in the present or future. Find out how to identify and concentrate on the metrics that have the most impact on your customer experience and your organization and Customer Service Rep's performance. Find out how to look at the metrics that are focused on customer-facing including: Net Promoter Score, Customer Effort, KPIs for Performance and First Call Resolution (FCR). These strategies and actionable feedback data will distinguish from your competitors as they are the metrics the customers actually notice

12:30 **Luncheon for delegates and speakers**

TRACK SESSIONS BEGIN Customized Learning! This event will include two new track streams. Attendees are welcome to move in and out of the two tracks based on the topics/speakers that interest them most. Tracks: 1) Strategic Management topics and 2) Operating Management topics.

TRACK 1 STRATEGIC MANAGEMENT

1:45 **A Separate Focus on Quality and Competency Drives the Best of Both**



Judy Brown
Manager -- Customer Experience, AAdvantage Customer Service
American Airlines

The American Airlines AAdvantage program was the first airline loyalty program when it launched on May 1, 1981, and today it remains one of the largest. Our distinguished presenter manages a 200 seat AAdvantage Customer Service Call Center in the Dallas/Fort Worth area to assist members with questions about the program or their accounts. In this session, we'll find out how the airline is driving customer satisfaction and employee engagement by splitting out coaching from business competencies. Learn how the two teams responsible for these results collaborate to get the job done:

- Quality Assurance team observes and coaches reps 1 on 1, focusing on the customer experience and quality interactions

TRACK 2 OPERATING MANAGEMENT

BIG DATA IS WORTH IT - IF YOU PLAN TO GET BIG RESULTS



Edward Poorbaugh
Manager, Support Center Operations and Supplier Support
Sysco Business Services

Big Data can be daunting. Find out how to create a roadmap that guides your team on implementation success strategies. In this session, we'll explore why big data is more than just reports. Walk away with strategies for managing the data to improve customer experience and grow sales.

- Developing a roadmap for implementation
- Engaging internal employees
- Employing data for call routing
- Targeting profitable customers and segmenting callers

TRACK SESSIONS CONTINUE

TRACK 1 STRATEGIC MANAGEMENT

- Supervisor team tracks, guides, motivates and rewards representatives on their business competencies

Discover how this collaborative approach is enabling AA Advantage Customer Service to achieve positive customer survey results while operating efficiently. According to Judy Brown, "by definition our members are the airline's most loyal customers so our interactions with them have to be positive and engaging."

2:35 **MEASURING CUSTOMER CARE IN SOCIAL MEDIA Putting the "Me" in Social Media: You Should Be Involved!**



Toni Jones
Social Media Director
U-Haul

Our presenter is an experienced program manager, analyst and customer advocate turned Social Media Director. Toni always had passion for the customer and U-Haul, serving do-it-yourself movers and their households since 1945, and wanted to make sure the brand reputation was managed online. U-Haul's social media team stands alone, but is deeply integrated with marketing, customer service, public relations and web analytics teams. Social media is often looked at as something that's "out there." We need to be involved in social media and demand a seat at the table for social media discussions. Don't miss this session focused on an implementing an integrated, measurable social customer care strategy.


- Positioning social media as a key component of your customer feedback program
- Leveraging social media to reduce transactional calls and focus on more strategic customer communications
- Closing the disconnect between the customer care and the social media team
- Measuring response times and customer satisfaction rates
- Translating social customer feedback into changes in processes/ products
- Tracking and comparing the issues of the social and non-social customers

Find out how to achieve a huge turnaround in customer responsiveness and drive business results

TRACK 2 OPERATING MANAGEMENT

Don't miss the demonstration of how to conduct real time guidance and agent desktop implementation

Measuring the Performance of Outsourced Vendors and Ensuring they are Synched up with Internal Corporate Strategies



Frank Burhance
Customer Service Director
Shutterfly


This session will explore strategies for positioning your outsourcer as an extension of your service rather than a separate service entity. You have "skin in the game" as their service levels are your service levels.

- Conducting quarterly performance reviews with outsourcing vendors
- Implementing processes that enforce KPIs
- Hitting service levels
- Ensuring the management team at the outsourcer and your organization are closely monitoring performance by minute and hour
- Supporting and aligning with overall corporate goals around service levels and KPIs
- Transitioning from an outsourcer that doesn't meet desired standards and performance levels

Find out how to contain costs, scale up resources based on peak volume/season, achieve staff flexibility and improve customer experience.

3:25 **Afternoon Networking Break**

4:10 **Implementing Speech Analytics to Maximize Performance and Create a Well Balanced Scorecard**



Alicia Sweatt
Director Customer Care, Club Services
Bluegreen

Proudly
Featuring a Top Rated
IQPC Presenter and
Call Center Excellence
Awards Judge

Many centers are simply surveying consumers with a few questions centered around consumer satisfaction. Find out how Bluegreen Corporation, a leader in the vacation ownership industry, surveys how well the company does on every call and on particular interactions. Speech analytics empowers Bluegreen to look at the qualitative side of what took place in an interaction rather than just the actual score of the survey. In this session, we will explore analytics best practices for creating a well balanced scorecard.

- Categorizing reports by many factors including: agent ownership, stressors, dissatisfaction, empathy, and satisfaction
- Arming agents with techniques on how to diffuse challenging calls and select from additional means of word choices

Walk away with the insight needed to determine what happened during the call and after the call, while also uncovering how an agent maximizes their call performance. Find out how to employ analytics to create valuable business intelligence for marketing/sales, reservations, and collections while also developing and empowering agents.

Customer "Care-Opoly" Employing a Version of Monopoly that Improves Customer Support and Satisfaction in a Fun Way!



Joe Arsenault
Senior Manager
Time Warner Cable

Using a Time Warner Cable (TWC) specific version of the "monopoly" game issues regarding customer support and satisfaction will be presented in a fun and entertaining way. The overall game objective is to control the greatest number of customers, increase service satisfaction and be the only player not to go bankrupt. For this presentation, as the player moves around the board they will encounter various real-life events that can impact their customer and service support. These events will be compared to actual analysis providing insight into the underlying issues.

Examples to be presented are:

- Exceed 90/30 service level, collect \$500.
 - Low customer satisfaction, do not collect \$300.
 - Provide multi-channel support, collect \$100.
 - Support customers effectively with outsourcing, collect \$350.
- This session will be fun and educational.

5:00 **Day One Concludes**

6:30 **Dinner Dine Arounds**

End your day with a dinner with fellow attendees. We will have a sign-up sheet to local restaurants at the information desk. Attendees are responsible for their food & beverage. Dinner themes will include:

- Aligning Your Call Center with Business Imperatives
- Gaining Business Intelligence with Customer Feedback
- Coaching Strategies for Inspiring Excellence



7:15 **Registration & Morning Coffee**

8:00 **Chairperson's Opening Remarks**

8:15 **BACK BY POPULAR DEMAND SPECIAL EXTENDED SESSION by an IQPC Call Center Excellence Award Winner! Learning Style –Live Coaching Session**

Don't miss this live mock coaching session designed to demonstrate how to empower people through Self Discovery. Learn techniques for coaching your way to world-class excellence.

Coaching your Way to World-Class Results!



Steve Riddell
Vice President and Chief Operations Officer
Blinds.com

2010 Winner IQPC Call Center Excellence Awards – Best in Class Call Center (under 200 staff)

2011 #1 Best Places to Work Award for Companies between 100-500 employees by the Houston Business Journal

Very often, boosting productivity comes at the expense of job satisfaction and entails involving longer hours and more responsibilities. Find out how to concentrate on skill development in the organization and coach your way to world-class excellence. Walk away from this session with a completely different approach of how to boost productivity and revenue, and decrease costs – all while protecting culture.

This session will include live coaching sessions designed to demonstrate how to coach your way to world-class excellence. It will also provide you with the insight needed to determine whether you are allocating your time/attention properly for achieving maximum performance results.

Attend this eye session and find out how to:

- coach everyone in your organization – everyday - with an emphasis on Skill Development
- create a culture that inspires employees and mirrors award winning companies
- achieve year over year performance improvement with every one of your call center staff

Find out why it's importance to focus on "competence" rather than "compliance" with sales and customer service people.

Results: Achieve double digit performance and close rates – Find out how Steve Riddell's team averages over 35% close rates, up from 12% just 4 years ago

10:00 **Morning Networking Break**

10:45 **KEYNOTE: MAKING THE TRANSITION FROM FLOUNDERING TO FLOURISHING – Focusing on Metrics that Matter**



Dawn Nesvig
Vice President of Sales
Hotze Health and Wellness

Hotze Health and Wellness Is a unique Health and Wellness Center with a natural approached wellness center, pharmacy and vitamin store. Find out how the company received a 20% growth in revenue by tracking the measurements that mattered to the business including: number of leads, consultation conversions, sales cycle, source codes, and cancellations. The company employs the measurement results as an internal tool for coaching and developing employees to achieve maximum performance.

- Sharing measurement results internally throughout the company and generating business intelligence
- Tracking only what's useful to the business
- Focusing on pinpointing the metrics that matter to your business
- Sharing numbers with the team focused on 20% growth per year
- "Talking goals" with your sales team so they understand their role in meeting goals

Find out how Hotze Health and Wellness is focusing on measurement, coaching and driving business value to achieve a lofty goal of 20% growth on a yearly basis

11:30 **KEYNOTE: Creating a Closed Loop Customer Feedback System that Creates Business Intelligence**



Jamie Morin
Senior Vice President
Wex Inc.

Our distinguished presenter from a Business to Business company will share strategies for integrating data from speech analytics with Enterprise Feedback Management. Find out how to take a cross functional look at Voice of the Customer and leverage the insights into action points.

- Gaining regular exposure to customer profiles
- Taking a grass roots effort to ensure the information shared is what matters to customers
- Integrating information from customers and partners for annual advisory boards
- Realizing hard benefits including: improved response rates and higher sales close rates with an investment in speech analytics
- Enhancing training by sharing the best and worst in live calls

2013 Top 50 small-sized call centers in the U.S. and Canada – BenchmarkPortal and The Center for Customer Driven Quality (CCDQ)

2012 Top 20 medium-sized call centers in the U.S. and Canada - BenchmarkPortal and The Center for Customer-Driven Quality (CCDQ)

12:30 **Luncheon for Delegates, Speakers, Sponsors and Media Partners**

TRACK SESSIONS BEGIN Customized Learning! This event will include two new track streams. Attendees are welcome to move in and out of the two tracks based on the topics/speakers that interest them most. Tracks: 1) Strategic Management topics and 2) Operating Management topics.

TRACK 1 STRATEGIC MANAGEMENT

1:30 **Transitioning your Call Center from a Typical "Customer Service" Environment to a "Sales Environment"**



Patrick O'Shea
Director of Acquisition & Retention
TXU Energy



Susan Wolski
Customer Operations Manager: Performance & Workforce Management
TXU Energy

TRACK 2 OPERATING MANAGEMENT

Building Enterprise Value by Measuring Performance

Gone are the days of simply answering and responding to calls. Call centers are now expected to deliver on the company brand experience and positively affect revenue. As call centers take on an increasing strategic role, there is a demand for more advanced metrics and analytics capable of linking performance to behavioral and financial outcomes.

In this session you will find out how to align and prove financial and loyalty results. Become a "hero" in your organization by bringing

TRACK SESSIONS CONTINUE

TRACK 1 STRATEGIC MANAGEMENT

Transitioning from a service to sales environment can be challenging. But, in a competitive marketplace, it's important to focus on upselling or cross selling products/services. TXU Energy, the largest energy provider in the state of Texas with 1.7+ million customers, 7 call centers and 800 Full Time Equivalents (FTEs), will share strategies for driving the sales and service team to some of their highest metrics.

- Implementing a consultative sales model – GGAC (Greet, Gather, Advise & Close)
- Improving scripting and customer interaction analysis
- Transitioning from a pricing model to features and benefits
- Changing compensation plans to focus on margins
- Transforming metrics to revolve around customer experience
- Socializing agents to understand “true selling” in new hire and recurrent training

Hear about how TXU Energy's center began paying for its own expenses within three months, improved employee morale and provided more opportunity for call center personnel. Walk away with strategies for creating a sales and service culture that drives targeted financial results while increasing employee retention and customer loyalty.

TRACK 2 OPERATING MANAGEMENT

organically derived financial data to your CFO.

- Supporting and aligning our corporate missions statement\
- Calculating enterprise value: ROI performance, savings, and earnings per share performance.

Walk away with strategies for aligning with corporate goals and measuring financial results. This will give you a seat at the C Suite!

2:20 **Afternoon Networking Break**

3:05 **Re-Vamping your Culture with Multi-Generations in Mind**



Tonya Choate

MBA, PMP, ITIL, Applications Security Administration Manager
Baylor Health Care System

Baylor Health Care System is a \$4.08 billion, not-for-profit, faith based organization providing services to acute care hospitals and related health care entities. Its network of over 300 supporting organizations provides patient care, medical education, research and community service. We have so many different generations in the workforce. How can you revamp your culture to inspire excellence while taking into account the characteristics and skills sets of multi generations? How should we engage Millennial? How do Millennials differ from Baby Boomers in terms of their productivity and attitude?

- Understanding what's important to different generations
- Developing and leading a highly diverse workforce
- Creating an employee and

Staffing and Scheduling Best Practices for Maximizing Quality and Efficiency

George Ricci

President

QE Foundation, Inc.

The QE Foundation is a tax exempt 501©(3) nonprofit education and research private operating foundation established to promote more and better jobs, services and cost effective efficiency in seven day a week workplaces. Our distinguished speaker will share his expertise in staffing and scheduling methodologies in all kinds of 7 day-a-week labor dependent services and industries. I'm sure we've heard of "Blue Mondays," "Hump Wednesdays" and the ever popular "TGIF" (Thank God it's Friday!). As the front line to customers, it is critical for our agents to deliver an "opening night performance" on each and every call.

- Scheduling methodologies that deliver peak energy and performance
- Creating high performance teams
- Matching revenue with expenditures
- Identifying peak performance periods and staffing options
- Understanding the performance proficiency of individual agents i.e. some can perform well in 8 hour shifts and others work better in shorter intervals

Walk away with new strategies for putting the right people together and translating "good chemistry" into enhanced performance.

4:00 **CONCLUDING KEYNOTE**

Proudly featuring a finalist in IQPC's 2013 Call Center Week Excellence Awards in the "Leader of the Year" category!

The Role of the Leader in Driving Culture for the Team



Steve Ellis

Senior Director

EyeMed Vision Care

Our distinguished leader is "passionate about engaging the hearts and minds of associates" so they can drive business results. This session will highlight the strategic role the leader plays on creating the "right" culture that inspires excellence, including four key areas of strategic leadership.

- Establishing a clear and compelling "ACE vision" for the Customer Care Center (A great place to work, Cost effective solutions and Exceptional customer service).

- Leading the team to make process improvements that deliver great customer service and leverage the voice the customer to drive business change.
- Encouraging Talent Development - working with the management team and agents to define career aspirations, and support dreams by encouraging agent promotions both within the CCC and to other departments throughout the organization.
- Generating Business Intelligence - partnering with Product Innovation team to have focus groups with team members to share new product ideas; launching a vibrant associate suggestion process

Find out how these innovations help drive both improvements in efficiency and in the ability to serve customers.

4:45 **Event Concludes**



8:30AM -12:30PM (8:00AM Registration)

CALL CENTER SITE TOUR LEADER – NEW YORK LIFE INSURANCE!

Here's your chance to visit the call center of an award winning organization and see culture and technology "in action."

OPENING PRESENTATION

Finding the Best Fit: Recruiting for your Culture & Conducting Hiring Assessments for Talent Development



Lynn O'Neill
Corporate Vice President
New York Life

This opening session will provide strategies for uncovering the right fit for the right jobs – all in accordance with your overall culture and missions. Find out how New York Life reduced turnover and firmly believes that you should never settle with your hiring selections. Learn about New York Life's hiring assessment process and how they've streamlined it for top efficiency. You'll have a chance to actually see the hiring assessment dashboards.

Find out how to employ pre-hiring assessments to streamline recruiting processes for effectiveness and efficiency.

- Pre-determining a candidate's cultural fit with your organization
- Leveraging personality profiles to match candidates with different internal positions
- Employing scorecards and analysis to review results and probe candidates for the best fit
- Pinpointing candidates' strengths and weaknesses by analyzing their scores

After the presentation, we will go on a walk around tour of the call center. The Dallas center handles agent and client inquiries and includes a back office processing center. Yearly call volume is 1.8 million. Talk full advantage of this opportunity to share best practices!



"In the end, all business operations can be reduced to three words: people, product and profits. Unless you have a good team, you can't do much with the other two." - Lee Iacocca



Venue & Accommodation

Dallas/Addison Marriott Quorum by the Galleria

14901 Dallas Parkway, Dallas, Texas
75254, United States
Website: www.marriott.com/DALQC
Phone: 972-661-2800

Group Rate: \$129 plus 13% occupancy tax per night

Please identify you are part of the **IQPC – Call Center group** to ensure the special rate, based on availability. Note that you are eligible for this rate three day prior and three days post the event based on availability. Please make your reservation before **September 15, 2013** in order to ensure you are eligible for the group rate.

Reservations Phone: 800-228-9290



Registration

3 Easy Ways to Register:

- 1 Call 1-800-882-8684
- 2 Email enquiry@iqpc.com
- 3 Visit www.callcentermetricsevent.com

END USER PRICING*	Register & Pay by 6/28/2013, Save up to \$600	Register & Pay by 8/2/2013 Save up to \$400	Register & Pay by 9/6/2013 Save up to \$400	Standard & Onsite Pricing
4 Day Pass (Best Value) • Focus Day (Monday) • Main Conference (Tuesday & Wednesday) • Site Tour (Thursday)	\$2,499	\$2,699	\$2,899	\$3,099
3 Day Pass • Focus Day (Monday) • Main Conference (Tuesday & Wednesday)	\$1,599	\$2,199	\$2,399	\$2,599
2 Day Pass • Main Conference (Tuesday & Wednesday)	\$1,199	\$1,399	\$1,599	\$1,799
Add Site Tour	\$549			

*An end user is someone who can directly benefit from the content provided in the program. IQPC reserves the right to determine who qualifies as an end user.

VENDOR PRICING	Register & Pay by 6/28/2013, Save up to \$600	Register & Pay by 8/2/2013 Save up to \$400	Register & Pay by 9/6/2013 Save up to \$400	Standard & Onsite Pricing
4 Day Pass (Best Value) • Focus Day (Monday) • Main Conference (Tuesday & Wednesday) • Site Tour (Thursday)	\$3,099	\$3,299	\$3,499	\$3,699
3 Day Pass • Focus Day (Monday) • Main Conference (Tuesday & Wednesday)	\$2,599	\$2,799	\$2,999	\$3,199
2 Day Pass • Main Conference (Tuesday & Wednesday)	\$1,799	\$1,999	\$2,199	\$2,399
Add Site Tour	\$549			

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We are happy to work with you to coordinate additional private functions, meet and greets with technology providers and/or activities that would allow you to extract even more value from this event. Email us at enquiry@iqpc.com for more information on group rates.

# of people	% of savings
3-4	15%
5-6	20%
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MAKE CHECKS PAYABLE IN U.S. DOLLARS TO: IQPC

* CT residents or people employed in the state of CT must add 6.35% sales tax.

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Details for making payment via EFT or wire transfer:

JPMorgan Chase - Penton Learning Systems LLC dba IQPC: 937332641

ABA/Routing #: 021000021

Reference: Please include the name of the attendee(s) and the event number: 21516.002

For IQPC's Cancellation, Postponement and Substitution Policy, please visit www.iqpc.com/cancellation

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- 4 Day Pass 3 Day Pass 2 Day Pass Add Site Tour

Name _____ Job Title _____

Organization _____ Approving Manager _____

Address _____ City _____ State _____ Zip _____

Phone _____ E-mail _____

Please keep me informed via email about this and other related events.

Check enclosed for \$ _____ (Payable to IQPC) Charge my AmEx Visa MasterCard Discover
Card # _____ Exp. Date ____/____/____ CVM Code _____

I cannot attend, but please keep me informed of all future events.

21516.002/GK