



SQM's 2008 Call Center Summit Conference

Recognize Award Winning Call Centers and Hear Their Success Stories for Improved and World Class FCR and Customer Satisfaction Performance

This is SQM's 10th Annual Call Center Conference in Toronto

Dates: Tuesday, November 18th, Wednesday, November 19th, Thursday, November 20th 2008

Locations: Marriott Eaton Centre Hotel, 525 Bay St, Toronto and Cogeco Cable Burlington Call Center

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| Tue, Nov. 18 | Optional Workshops Agenda (Marriott) |
| 8:00 - 2:00 | <p>Workshop A - SQM Reportcard® Online Reporting Tool: <i>SQM Workshop Leaders: Glen Mah, VP of Technology, Lara Pow, VP of QA & Analytics, Charlene Hutchison, Director Technology, Quality and Coordination</i> <u><i>This workshop is designed for SQM Tracking Clients only</i></u></p> <p>For new users of SQM Reportcard®, this workshop is designed for individuals who are responsible for SQM's online Reportcard® reporting and/or conducting analytical assessments.</p> <p>Reporting – New Web based Reporting</p> <ul style="list-style-type: none"> ● Password and User ID security practices ● Navigating the web portal ● Available reports through the web portal <p>Reporting – Citrix Reporting</p> <ul style="list-style-type: none"> ● SQM Citrix reporting and SQM web based reporting ● Report Menu (learn about key reporting areas) ● Dashboard Reporting (how to use dashboard key metrics) ● FCR Reporting (learn about the FCR reports) ● Targeted Opportunities (learn how to use targeted opportunities for improvements) <p>Lunch</p> |
| 12:00 – 12:30 | <ul style="list-style-type: none"> ● Tracking Reporting (how to use the control and historical charts) ● FCR Reportcard® (how to use for CSR/Mgr coaching) ● Scheduler (learn how the report scheduler works) ● Data Extract (discover how to use data extracts for data mining) ● Upcoming Changes (learn about future SQM Reportcard® advancements) |
| 2:00 – 4:00 | <p>Workshop B - Customer Surveying Methods: <i>SQM Workshop Leaders: Lara Pow, VP of QA & Analytics, Sarah Kennedy, Sr. VP</i></p> <ul style="list-style-type: none"> ● An overview of the different types of surveying methods: live, IVR (inbound and outbound), Hybrid (combination of live interviewer and IVR tool), Email / Web ● Pros and Cons for each method ● SQM recommendations for the best application for each method ● The implications of using multiple methods |
| 4:00 | Close of Workshops |

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| Tue, Nov. 18 | SQM Call Center Industry Awards Dinner Agenda (Marriott) |
| 5:00 pm | <p>SQM Call Center Industry Awards and Dinner: This is SQM's 10th Annual Most Prestigious North American Call Center Industry 2008 Awards for Service Quality Excellence – as judged by customers who call the call center and by employees who work in the call center. SQM will be presenting Service Quality Excellence Awards and Certificates in the following categories...</p> <ul style="list-style-type: none"> • Call Center Customer Satisfaction Awards • Call Center Employee Satisfaction Awards • Certified World Class Call Center Awards & Certificates • Certified World Class Customer Representative & Manager Awards & Certificates • Customer Representative (CR) of the Year and Top 10 Finalist CR Awards <p>This year's event features a fabulous 3 course dinner paired with world class wines and also features Tracy Bell as our entertainer, whose "8 Divas in 44 minutes" show won the Star 2005 Entertainer of the Year Award. Also there will be immediate award acceptance photos available, and much more. (<i>Formal Business Attire Requested</i>)</p> |
| Wed, Nov. 19 | SQM Summit Agenda (Marriott) |
| 7:30 | Continental Breakfast |
| 8:00 | <p>Introduction: <i>Presenter: Sarah Kennedy, Sr. VP, SQM</i></p> <ul style="list-style-type: none"> • SQM Summit Opening Remarks and SQM Award Announcements |
| 8:15 | <p>State of the Call Center Industry in 2008: <i>Presenter: Mike Desmarais, President and Founder, SQM</i></p> <p><i>This presentation is based on SQM's new Customer Quality Assurance service and benchmarking over 350 leading North American call centers on FCR and Customer Satisfaction in 2008. Call Centers included in our benchmarking study are Marriott, 28 Blue Cross Blue Shield Plans, Capital One, Canadian Tire, TD Bank, Scotiabank, Royal Bank, MBNA, Citifinancial, Discoverfinancial, US Bank, Sun Life, Rogers, etc.</i></p> <ul style="list-style-type: none"> • New and historical data from SQM's benchmarking study on measuring and managing FCR & call resolution • Proven success factors for driving FCR & call resolution • Customer Quality Assurance, a new approach for assessing and coaching Customer Representative performance case study |
| 10:15 | Coffee Break |
| 10:30 | <p>SQM Client Success Stories: Accountability to the Customer <i>Presenter: AIR MILES Reward Program (LoyaltyOne)</i></p> <p>In this presentation LoyaltyOne (operators of Canada's AIR MILES Reward Program) will outline their bold initiative to survey each representative at 10 surveys per month using a fully automated IVR. They will share how they introduced the reporting, coaching and truly innovative reward program that allows all these pieces to be viewed as a total focus on the customer experience.</p> <ul style="list-style-type: none"> • Overview of the Loyalty Business • Building the Collector Experience Blue Print • The results – Customer and Employee • Next steps - What the Future Holds |

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| 11:30 | <p>SQM Client Success Stories: World Class Service in the Blue Cross World Presenter: Gloria Pegurri, Blue Cross and Blue Shield of Massachusetts <i>In this presentation, BCBS Massachusetts will outline how their unique model of “concierge service” has delivered consistently high customer results and caused them to re-think some of the conventional measures of quality.</i></p> <ul style="list-style-type: none"> ● Overview of quality as measured in the BCBS world ● Explaining “concierge service” and why it is unique ● Justifying “concierge service” in terms of productivity and customer results ● Using SQM data to enhance the service model ● Next steps for BCBS Massachusetts |
| 12:30 – 1:30 | Lunch |
| 1:30 – 2:30 | <p>SQM Client Success Stories: Improving Employee Satisfaction Presenter: Scotiabank, Halifax <i>Call Center of the Year in 2007</i> <i>In this presentation Scotiabank will outline how they improved employee satisfaction by 30% slowly but surely over 5 years while also shifting their focus from a sales culture to a service culture.</i></p> <ul style="list-style-type: none"> ● Working with an educated and ambitious workforce ● Getting Team Manager support ● Rewards and recognition ● Balancing the balanced score card ● Next steps for Scotiabank |
| 2:30 – 2:45 | Coffee Break |
| 2:45 – 4:00 | <p>SQM Client Success Stories: Customer Quality Assurance: A case study on the full integration of customer surveying and quality assurance Presenter: Terri Martens, Director Quality Management and Communications Rogers National Technical Service Delivery <i>This presentation is an exposé on the newest and most innovative method of coaching to improve the key customer metrics.</i></p> <ul style="list-style-type: none"> ● The mechanics of the customer surveying process ● The mechanics of the QA assessment ● The mechanics of the integrated reporting ● The results ● The employee reaction to the program |
| 4:00 – 5:00 | <p>Tactics for Leveraging the World Class Customer Representatives: Presenter: Sarah Kennedy, Sr. Vice President, SQM <i>This session is specifically designed for the World Class Customer Representatives</i></p> <ul style="list-style-type: none"> ● This session focuses on how to use the skills of your World Class Customer Representatives in a variety of ways to further boost your FCR performance ● Profiling and Hiring for the World Class Customer Representative ● Using the World Class Customer Representative in training and coaching ● Career growth for the World Class Customer Representative |

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| | <ul style="list-style-type: none"> Coaching the World Class Customer Representative |
| 5:00 | Close of Summit Day One |
| Thur, Nov. 20 | <p>Cogeco Cable Burlington Call Center Site Tour</p> <p>This year's tour will be held at Cogeco Cable Burlington Call Center Site, the 2007 winner of Highest Customer Satisfaction in the Telecommunication Industry. The Telecommunication industry is typically a 4th quartile performer while Cogeco Cable by comparison, is a 2nd quartile performer – some 12-15% higher in overall satisfaction than their Telco peer group.</p> <p>We will be visiting their 250 seat call center operation by bus to see the following key principles in operation:</p> <ul style="list-style-type: none"> Active subject matter experts Clear targets for FCR performance with well designed rewards Specialized queues for typical problem calls Smart use of outbound calling Smart integration of technical services with customer services Focus on reduction of employee turnover |
| 7:00 | Continental Breakfast |
| 7:30 | Depart by bus / car to Call Center Site |
| 8:30 – 12:30 | Call Center Tour at Cogeco Cable Burlington Location |
| 12:30 | Close of Tour and bus departure for Toronto airport |

Hotel Location:

- Marriott Toronto Downtown Eaton Centre Hotel, 525 Bay St, Toronto, ON, M5G 2L2, Canada
- Tel: 416 597 9200, Fax: 416 597 9211, Reservations: 800 905 0667, www.marriott.com
- Hotel accommodation and travel costs are the responsibility of the attendee
- Hotel cost has been negotiated at a cost of \$189.00 per night. Please book hotel directly referencing ID number (SQMC)

Call Center Tour Location:

- Cogeco Cable, 950 Syscon Rd, Burlington, ON L7R 4S6

SQM Contacts:

- Sarah Kennedy, 519.426.3454
- Julie Henstock 250.275.8043

Cost:

Cost is based on the 2008 Summit events that you choose to attend. It is calculated on a shopping cart basis:

Workshop A (Tue, Nov 18 (8-2) \$500

Workshop B (Tue, Nov 18 (2-4) \$250

Summit Awards Dinner (Tue, Nov 18) (single person attendance) \$150

- Table for 10 \$1500
- Tables for 20 \$2800 (\$140 per head)
- Tables for 30 \$3900 (\$130 per head)
- Tables for 40 \$4800 (\$120 per head)

Summit Conference (Wed, Nov 19) \$1200

Call Center Site Tour (Thur, Nov 20) \$300

Register by July 1st and receive 10% Early Bird Discount