



17th Annual Conference

One Contact Resolution Research and Best Practices and Contact Center Industry Awards

Coeur d'Alene, Idaho
May 17 – 19, 2016

One Contact Resolution Research & Best Practices Conference

Agenda Overview

Monday, May 16th – Meet & Greet Welcome Event

Time	Location	Details
8:00 am – 6:00 pm	Spokane Airport Concierge Lounge	Refresh after your flight with juice, coffee and snacks at our relaxing Concierge Lounge at Spokane Airport before hopping on the shuttle to the resort. Shuttle arrangements can be made with the CDA Resort.
3:00 pm – 5:30 pm	SQM's State-of-the-Art Contact Center	Staggered groups to be taken on buses throughout the afternoon for a tour of SQM's US state-of-the-art contact center facility.
6:00 pm – 9:00 pm	Coeur d'Alene Resort Whispers Lounge	SQM cordially welcomes guests to Coeur d'Alene with an evening of fine wine and appetizers at the Whispers Lounge and Lakefront Patio. Featuring acoustic entertainment by Eric Henderson.

Tuesday, May 17th – Day 1 One Contact Resolution Research & Best Practices

7:30 am – 9:00 am	Boat Cruise & Breakfast	<p>Boat Cruise to Hagadone Events Center</p> <p>Meet at the lakefront boardwalk at Coeur d'Alene Resort to board the cruise boat at 7:30 am to cruise the lake on your journey to the Hagadone Events Center. Kick-off the SQM conference while enjoying a delicious breakfast to start your day right. Boat departs at 8:00 am.</p>
9:30 am – 11:00 am	Hagadone Events Center	<p>One Contact Resolution Research - Mike Desmarais, CEO and Founder, SQM Group</p> <p>SQM will share highlights from our new book titled One Contact Resolution which focuses on contact channel operational, customer experience research and best practices. Specifically, SQM will share contact channel (i.e., call center, web self-service, IVR self-service, email, chat) FCR and OCR research based on benchmarking over 500 contact centers and conducting over 2.5 million phone surveys.</p> <p>See page 4 for details</p>
11:00 am – 12:00 pm		<p>Chat Channel Best Practices –</p> <p>Anne Palmerine, Associate Vice President, Customer Engagement & Enrollment Services, UPMC Health Plan</p> <p>Cori Hoff, Quality Improvement, UPMC Health Plan</p> <p>The best practices they used to achieve world class chat channel service.</p> <p>See page 4 for details</p>
12:00 pm – 1:30 pm		<p>Buffet Lunch & Hole-in-One Tournament</p> <p>Try your golf hand at SQM's Hole-in-One Prize Tournament on one of the most beautiful and unique golf holes in the world.</p>
1:30 pm – 2:30 pm		<p>Website Self-Service Best Practices –</p> <p>Scott Webb, Manager, Customer Programs and Research, FortisBC</p> <p>The best practices they used to achieve world class website service.</p> <p>See page 5 for details</p>
2:30 pm – 3:30 pm		<p>IVR Self-Service Best Practices –</p> <p>Lisa Duenas, Senior Operations System Administrator, Vision Service Plan</p> <p>Tricia Will, Contact Center Operations Manager, Vision Service Plan</p> <p>Jay Castergine, Business Consulting, Nuance</p> <p>The best practices they used to achieve world class IVR service.</p> <p>See page 5 for details</p>
3:30 pm – 5:45 pm	Hagadone Garden Boat Cruise & Tour	<p>Boat Cruise to Hagadone Gardens</p> <p>Board the boats again at 3:30 pm to cruise to Hagadone Gardens and stroll through the Hagadone family estate gardens (owners of Coeur d'Alene Resort), featuring over 25,000 varieties of plant species. Boat departs gardens at 5:45 pm.</p>
5:45 pm – 8:00 pm	Boat Cruise & Dinner	<p>Boat Cruise Dinner</p> <p>Enjoy a splendid gourmet buffet dinner during the return to the resort. Local beer and wine stations featured along with Karaoke to sing and dance the night away!</p>

Wednesday, May 18th - Day 2 One Contact Resolution Best Practices Tracks

All Day 2 Events (Excluding Dinner) Take Place at Coeur d'Alene Resort Convention Center


	Executive Track (By invitation only) Boardroom 5ABC	Management Track (Available to all conference attendees) Bay 2
	Mike Desmarais, CEO and Founder of SQM, will share contact channel operational research and best practices. In addition, world class leaders will share best practices for improving customer experiences using contact channels.	World class leaders from some of the best known organizations in North America will share their best practices for improving or maintaining world class FCR performance
7:00 am – 8:00 am	Breakfast Buffet at Club Coeur d'Alene	Breakfast Buffet at Bay 3-4
8:00 am – 9:00 am	Contact Channel Operational Benchmarking Research Mike Desmarais, SQM See page 6 for details	Real-Time CSR Support Queue Matt Schricker and Dan McLaughlin, BCBS Massachusetts See page 8 for details
9:00 am – 10:00 am		CSR Call Resolution Training Mary Murcott, Dialog Direct / Lisa Gregovich, Prime Therapeutics See page 8 for details
10:00 am – 10:15 am	Coffee Break at Boardroom 5ABC	Coffee Break at Bay 2
10:15 am – 11:15 am	Performance Management System Nathalie Larouche, Cogeco Connexion See page 6 for details	3x Consecutive FCR Improvement Winner Jody Windhorst, Nationstar Mortgage See page 9 for details
11:15 am – 12:45 pm	Lunch Buffet at Club Coeur d'Alene	Lunch Buffet at Bay 3-4
12:45 pm – 1:45 pm	Real-Time CSR Support Queue Matt Schricker and Dan McLaughlin, BCBS Massachusetts See page 7 for details	CSR Hiring Process Rachel Stuchberry and Gabriella Marrone, Accenture Business Services for Utilities See page 9 for details
1:45 pm – 2:00 pm	Coffee Break at Boardroom 5ABC	Coffee Break at Bay 2
2:00 pm – 3:00 pm	3x Consecutive FCR Improvement Winner Jody Windhorst, Nationstar Mortgage See page 7 for details	Performance Management System Nathalie Larouche, Cogeco Connexion See page 9 for details
5:00 pm – 8:00 pm	"A Taste of Idaho" Themed Dinner at Hagadone Events Center Board the cruise boat to head over to the events center and join us for an evening sampling a variety of the best Idaho potato culinary creations, complete with campfires and s'mores on the beach. Featuring live entertainment by The Ryan Larsen Band. Boat departs at 5:30 pm to Hagadone Events Center.	

Thursday, May 19th – Day 3 One Contact Resolution Best Practices Tracks

All Day 3 Events Take Place at Coeur d'Alene Resort Convention Center

	Executive Track Boardroom 5ABC	Management Track Bay 2	mySQM™ Intro Bay 1A	CSR Appreciation Day
8:00 am – 9:00 am	Breakfast Buffet at Club Coeur d'Alene	Breakfast Buffet at Bay 3-4		
9:00 am – 10:00 am	TCPA Compliance Christine M. Reilly, JD, Partner, Manatt, Phelps & Phillips, LLP See page 10 for details	CSR Recognition Program Emily Fair, BCBS Vermont See page 13 for details	Introducing the New mySQM™ Web Portal See page 15 for details	CSR Appreciation Day Activities Available <ul style="list-style-type: none"> • Float Plane Package (new) • Zip Line Tour (new) • Horseback Riding (new) • Outdoor Adventure Package • Sushi, Sake & Beverly's Wine Tour & Tasting
10:00 am – 11:00 am	CSR Coaching Program Austin Cobb, Nationstar Mortgage See page 10 for details	Standard Operating Practice Patsy Bertoia, FedEx Canada See page 13 for details		
11:00 am – 11:15 am	Coffee Break at Boardroom 5ABC	Coffee Break at Bay 2		

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11:15 am – 12:15 pm	CSR Call Resolution Training Mary Murcott, Dialog Direct / Lisa Gregovich, Prime Therapeutics See page 11 for details	Quality Assurance Program Jennie Bradley, Millennium1 Solutions See page 14 for details	Break	<ul style="list-style-type: none"> • Golf Coeur d'Alene Course • Body Treatments at Coeur d'Alene Spa <p>See page 16 for details</p>
12:15 pm – 1:30 pm	Lunch Buffet at Club Coeur d'Alene	Lunch Buffet at Casco Bay/Kidd Island		
1:30 pm – 2:30 pm	CSR Recognition Program Emily Fair, BCBS Vermont See page 11 for details	CSR Coaching Program Austin Cobb, Nationstar Mortgage See page 14 for details	Introducing the New mySQM™ Web Portal See page 15 for details	
2:30 pm – 3:30 pm	Standard Operating Practice Patsy Bertoia, FedEx Canada See page 12 for details	TCPA Compliance Christine M. Reilly, JD, Partner, Manatt, Phelps & Phillips, LLP See page 15 for details		

Awards Ceremony Celebration & Gala Dinner

5:00 pm – 6:00 pm	Whispers Lounge	Cocktail Reception Mingle in the lounge and enjoy a few drinks before the main event.
6:00 pm – 12:00 am	Convention Center Ballroom	<p align="center">Gala Dinner & Awards Ceremony Semi-Formal Attire – Black Tie Welcome</p> <p>This is SQM's 17th Annual Most Prestigious North American Contact Center Industry Awards Program for Service Quality Excellence – as judged by customers who used a contact center and by employees who work in the contact center. SQM will be presenting Service Quality Excellence Awards and Certificates in the following categories:</p> <ul style="list-style-type: none"> • <i>Contact Center of the Year</i> • <i>Best Practices</i> • <i>Contact Center Customer and Employee Satisfaction</i> • <i>World Class Contact Center Certification</i> • <i>World Class Customer Representative and Supervisor Certification</i> • <i>First Call Resolution Improvement</i> • <i>Customer Service Representative of the Year and Top 24 Finalists</i> • <i>Supervisor of the Year and Top 5 Finalists</i> <p align="right">...And many more!</p> <p align="center">Featuring Live Entertainment by Rockadelic</p>

Friday, May 20th

End of Conference

Now that your heads are full of invaluable OCR and FCR Best Practices information, hop on the shuttle to the Spokane Airport or make a weekend of your trip to Idaho by exploring the nearby national parks and attractions.

Agenda Details

Tuesday, May 17 th – Day 1 One Contact Resolution Research & Best Practices	
One Contact Resolution Research 9:30 am – 11:00 am	Session: One Contact Resolution Research
	Speaker: Mike Desmarais, CEO and Founder, SQM Group
	Attendees: Open to all Executive and Management track registrants
	Description: Mike Desmarais, CEO and Founder, SQM Group, will share highlights from our new contact channel operation and customer satisfaction studies, and what that data means for contact center executives. Mike will also share customer experience, contact channel, FCR and OCR research based on benchmarking over 500 contact centers and conducting over 2.5 million phone surveys.
	Customer Experience Research Topics To Be Shared
	<ul style="list-style-type: none"> • Customer expectations when using a contact channel (i.e., web, IVR, call center, email, etc.) • How to define and measure one contact resolution • The benefits of using the one contact resolution metric • The differences between one contact resolution and first contact resolution • One contact resolution results for all major contact channels • Who should own the one contact resolution metric • How many contact channels do customers really use to resolve the same inquiry • Whether customers like to channel hop for resolving an inquiry • One contact resolution and first contact resolution performance rating differences • Customer satisfaction impact when two channels are used • The business case for measuring one contact resolution
	Session: Chat Channel Best Practices
	Speaker: Anne Palmerine, Associate Vice President Customer Engagement & Enrollment Services (TBC), UPMC Health Plan
	Speaker: Cori Hoff, Quality Improvement, UPMC Health Plan
	Attendees: Open to all Executive and Management track registrants
Chat Channel Best Practices 11:00 am – 12:00 pm	Describe how their chat channel works
	<ul style="list-style-type: none"> • Impact of the chat channel practice on the customer and employee experience • The plans to evolve the customer experience
	Describe the chat channel customer experience strategy
	<ul style="list-style-type: none"> • Key differentiators that enable the achievement of consistent satisfaction numbers
	How they incorporate customer feedback into their chat channel
	<ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
	How satisfied CSRs are with the chat channel in helping them improve or maintain their call resolution/Csat performance
	<ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with the chat channel • Action taken from employee feedback • CSR access to customer chat history
	Show the FCR/Csat performance for the chat channel
	<ul style="list-style-type: none"> • FCR and Csat performance of chat channel • Call volume coming from fail points in the chat channel

Tuesday, May 17th, cont'd - Day 1 One Contact Resolution Research & Best Practices

<p style="text-align: center;">Website Self-Service Best Practices</p> <p>1:30 pm – 2:30 pm</p>	<p>Session: Website Self-Service Best Practices</p>
	<p>Speaker: Scott Webb, Manager, Customer Programs and Research, FortisBC</p>
	<p>Attendees: Open to all Executive and Management track registrants</p>
	<p>Describe how their website self-serve channel works</p>
	<ul style="list-style-type: none"> • Impact of the website self-serve practice on the customer and employee experience • The plans to evolve the customer experience
	<p>Describe the website self-serve channel customer experience strategy</p>
	<ul style="list-style-type: none"> • Key differentiators that enable the achievement of consistent satisfaction numbers
	<p>How they incorporate customer feedback into their website self-serve channel</p>
	<ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
	<p>How satisfied CSRs are with the website self-serve channel in helping them improve or maintain their call resolution/Csat performance</p>
	<ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with the website self-serve channel • Action taken from employee feedback • CSR access to customer history and use of website for transactions
	<p>Show the FCR/Csat and completion rate performance for the website self-serve channel</p>
	<ul style="list-style-type: none"> • FCR and Csat performance of website self-serve channel • Website self-serve completion rates • Call volume coming from fail points in the website
	<p style="text-align: center;">IVR Self-Service Best Practices</p> <p>2:30 pm – 3:30 pm</p>
<p>Speaker: Lisa Duenas, Senior Operations System Administrator, Vision Service Plan</p>	
<p>Speaker: Tricia Will, Contact Center Operations Manager, Vision Service Plan</p>	
<p>Speaker: Jay Castergine, Business Consulting, Nuance</p>	
<p>Attendees: Open to all Executive and Management track registrants</p>	
<p>Describe how their IVR self-serve channel works</p>	
<ul style="list-style-type: none"> • Impact of the IVR self-serve practice on the customer and employee experience • The plans to evolve the customer experience 	
<p>Describe the IVR self-serve channel customer experience strategy</p>	
<ul style="list-style-type: none"> • Key differentiators that enable the achievement of consistent satisfaction numbers • Use of natural language • Improvements in authentication process 	
<p>How they incorporate customer feedback into their IVR self-serve channel</p>	
<ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback 	
<p>How satisfied CSRs are with the IVR self-serve channel in helping them improve or maintain their call resolution/Csat performance</p>	
<ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with the IVR self-serve channel • Action taken from employee feedback • CSR access to customer history and use of IVR for transactions 	
<p>Show the FCR/Csat and completion rate performance for the IVR self-serve channel</p>	
<ul style="list-style-type: none"> • FCR and Csat performance of IVR self-serve channel • IVR self-serve completion rates • Call volume coming from fail points in the IVR 	

Executive Track Details – Day 2

Wednesday, May 18 th – CDA Resort Convention Center, Boardroom 5ABC	
Contact Channel Operational Benchmarking Research 8:00 am – 10:00 am	Session: Contact Channel Operational Benchmarking Research
	Speaker: Mike Desmarais, CEO and Founder, SQM Group
	Description: Mike will share highlights from his new book titled One Contact Resolution. His presentation will be on SQM's Contact Channel Operational Benchmarking Research Study.
	Contact channel operational benchmarking research topics to be shared <ul style="list-style-type: none"> • Who owns the customer experience strategy • The metrics organizations use to measure customer experience • Customer experience operating practices • Personalized customer experience practices • Omni-channel operating practices • Contact channel strategy focus • Current and future contact channel volume distribution • Contact channels currently being used and will be used in the future • Contact channel resolution failure reasons • Call volume deflection practices • Implications of the emergence of new contact channels • Self-service customer experience measures • Proactive outbound communication practices • Whether technology will meet future needs
Performance Management System 10:15 am – 11:15 am	Session: Performance Management System
	Speaker: Nathalie Larouche, Senior Director, Sales Consumer Market, Cogeco Connexion
	Describe how their performance management system works <ul style="list-style-type: none"> • Who owns the performance management system • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements
	How they incorporate customer feedback into their performance management system <ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
	How satisfied CSRs are with their performance management system for helping them resolve calls <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their performance management system • Action taken from employee feedback
	Show the link between their FCR/Csat performance and their performance management system <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their performance management system • FCR and Csat performance after implementing their performance management system

Executive Track Details – Day 2, continued

Wednesday, May 18 th , cont'd – CDA Resort Convention Center, Boardroom 5ABC	
Real-Time CSR Support Queue 12:45 pm – 1:45 pm	Session: Real-Time CSR Support Queue Speaker: Matt Schricker, Manager Multi-Channel Member Service, Blue Cross Blue Shield Massachusetts Speaker: Dan McLaughlin, Senior Manager Member Service, Blue Cross Blue Shield Massachusetts Describe how their real-time CSR support queue works <ul style="list-style-type: none"> • Who owns the real-time CSR support queue • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements How they incorporate customer feedback into their real-time CSR support queue practice <ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback How satisfied CSRs are with their real-time CSR support queue for helping them resolve calls <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their real-time CSR support queue • Action taken from employee feedback Show the link between their FCR/Csat performance and their real-time CSR support queue <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their real-time CSR support queue • FCR and Csat performance after implementing their real-time CSR support queue
	Session: 3x Consecutive FCR Improvement Winner Speaker: Jody Windhorst, Vice President Customer Service Experience, Nationstar Mortgage A presentation that describes the journey of an organization that has achieved a 5% or greater FCR improvement each year for three years in a row. This presentation will cover the initiatives in each of the Best Practice areas of CSR hiring, CSR recognition, CSR coaching, CSR training, CSR career development, performance management, quality assurance, real-time CSR support queue, CSR call handling program, and desktop applications.

Management Track Details – Day 2

Wednesday, May 18th – CDA Resort Convention Center, Bay 2

<p>Real-Time CSR Support Queue</p> <p>8:00 am – 9:00 am</p>	<p>Session: Real-Time CSR Support Queue</p>
	<p>Speaker: Matt Schricker, Manager Multi-Channel Member Service, Blue Cross Blue Shield of Massachusetts</p>
	<p>Speaker: Dan McLaughlin, Senior Manager Member Service, Blue Cross Blue Shield Massachusetts</p>
	<p>Describe how their real-time CSR support queue works</p> <ul style="list-style-type: none"> • Who owns the real-time CSR support queue • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements
	<p>How they incorporate customer feedback into their real-time CSR support queue practice</p> <ul style="list-style-type: none"> • Method of employee feedback • Volume of employee feedback • Action taken from employee feedback
	<p>How satisfied CSRs are with their real-time CSR support queue for helping them resolve calls</p> <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their real-time CSR support queue • Action taken from employee feedback
	<p>Show the link between their FCR/Csat performance and their real-time CSR support queue</p> <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their real-time CSR support queue • FCR and Csat performance after implementing their real-time CSR support queue
	<p>Session: CSR Call Resolution Training</p>
	<p>Speaker: Mary Murcott, President, The Customer Experience Institute, Dialog Direct</p>
	<p>Speaker: Lisa Gregovich, Manager Vendor Operations, Prime Therapeutics</p>
<p>CSR Call Resolution Training</p> <p>9:00 am – 10:00 am</p>	<p>Describe how their CSR training program works</p> <ul style="list-style-type: none"> • Who owns the CSR training program • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements
	<p>How they incorporate customer feedback into their training program</p> <ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
	<p>How satisfied CSRs are with their training program for helping them improve their call resolution/Csat performance</p> <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their CSR training program • Action taken from employee feedback
	<p>Show the link between their FCR/Csat performance and their CSR training program</p> <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their CSR training program • FCR and Csat performance after implementing their CSR training program

Management Track Details – Day 2, continued

Wednesday, May 18th, cont'd – CDA Resort Convention Center, Bay 2

3x Consecutive FCR Improvement Winner 10:15 am – 11:15 am	Session: 3x Consecutive FCR Improvement Winner
	Speaker: Jody Windhorst, Vice President Customer Service Experience, Nationstar Mortgage
	A presentation that describes the journey of an organization that has achieved a 5% or greater FCR improvement each year for three years in a row.
	This presentation will cover the initiatives in each of the Best Practice areas of CSR hiring, CSR recognition, CSR coaching, CSR training, CSR career development, performance management, quality assurance, real-time CSR support queue, CSR call handling program, and desktop applications
CSR Hiring Process 12:45 pm – 1:45 pm	Session: CSR Hiring Process
	Speaker: Rachel Stuchberry, Eastern Canada Operations Lead, Accenture Business Services for Utilities
	Speaker: Gabriella Marrone, Customer Experience Manager, Accenture Business Services for Utilities
	Describe how their CSR hiring process works
	<ul style="list-style-type: none"> • Who owns the CSR hiring process • What are the objectives • Describe how the best practice works • What investments / resources does it require • Key lessons learned and mistakes to be avoided • Future improvements
	How they incorporate customer feedback into their CSR hiring process
	<ul style="list-style-type: none"> • Method of customer feedback and volume of customer feedback • Action taken from customer feedback
	How satisfied CSRs are with their CSR hiring process for helping them improve their call resolution/Csat performance
	<ul style="list-style-type: none"> • Method of gathering employee feedback and volume of employee feedback • CSRs' satisfaction ratings with their CSR hiring process • Action taken from employee feedback
	Show the link between their FCR/Csat performance and their CSR hiring process
<ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their CSR hiring process • FCR and Csat performance after implementing their CSR hiring process 	
Performance Management System 2:00 pm – 3:00 pm	Session: Performance Management System
	Speaker: Nathalie Larouche, Senior Director, Sales Consumer Market, Cogeco Connexion
	Describe how their performance management system works
	<ul style="list-style-type: none"> • Who owns the performance management system • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned and the mistakes to be avoided • Future improvements
	How they incorporate customer feedback into their performance management system
	<ul style="list-style-type: none"> • Method of customer feedback and volume of customer feedback • Action taken from customer feedback
	Describe the standard operating practices strategy
	How satisfied CSRs are with their performance management system for helping them resolve calls
	<ul style="list-style-type: none"> • Method of gathering employee feedback and volume of employee feedback • CSRs' satisfaction ratings with their performance management system • Action taken from employee feedback
	Show the link between their FCR/Csat performance and their performance management system
<ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their performance management system • FCR and Csat performance after implementing their performance management system 	

Executive Track Details – Day 3

Thursday, May 19 th – CDA Resort Convention Center, Boardroom 5ABC	
TCPA Compliance 9:00 am – 10:00 am	Session: TCPA Compliance
	Speaker: Christine M. Reilly, JD, Partner, Manatt, Phelps & Phillips, LLP
	Describe how to follow TCPA compliance
	<ul style="list-style-type: none"> • TCPA legislation as it applies to surveying data • Critical items that need to be complied with as call lists are generated • Implications for cell phones versus landlines • Compliance requirements according to survey methodology • Scope of consent
CSR Coaching Program 10:00 am – 11:00 am	Session: CSR Coaching Program
	Speaker: Austin Cobb, Vice President Customer Service, Nationstar Mortgage
	Describe how their CSR coaching program works
	<ul style="list-style-type: none"> • Who owns the CSR coaching program • What are the objectives • Describe how the best practice works • What investments / resources does it require • Key lessons learned • Mistakes to be avoided • Future improvements
	How they incorporate customer feedback into their CSR coaching program
	<ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
	How satisfied CSRs are with their coaching program for helping them improve their call resolution/Csat performance
	<ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their CSR coaching program • Action taken from employee feedback
	Show the link between their FCR/Csat performance and their CSR coaching program
	<ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their CSR coaching program • FCR and Csat performance after implementing their CSR coaching program

Executive Track Details – Day 3, continued

Thursday, May 19th, cont'd – CDA Resort Convention Center, Boardroom 5ABC

<p style="text-align: center;">CSR Call Resolution Training</p> <p>11:15 am – 12:15 pm</p>	<p>Session: CSR Call Resolution Training</p> <p>Speaker: Mary Murcott, President, The Customer Experience Institute, Dialog Direct</p> <p>Speaker: Lisa Gregovich, Manager Vendor Operations, Prime Therapeutics</p> <p>Describe how their CSR training program works</p> <ul style="list-style-type: none"> • Who owns the CSR training program • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements <p>How they incorporate customer feedback into their training program</p> <ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback <p>How satisfied CSRs are with their training program for helping them improve their call resolution/Csat performance</p> <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their CSR training program • Action taken from employee feedback <p>Show the link between their FCR/Csat performance and their CSR training program</p> <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their CSR training program • FCR and Csat performance after implementing their CSR training program
	<p>Session: CSR Recognition Program</p> <p>Speaker: Emily Fair, Director of Customer Service, BlueCross BlueShield of Vermont</p> <p>Describe how their CSR recognition program works</p> <ul style="list-style-type: none"> • Who owns the program • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements <p>How they know what motivates each of their CSRs to improve their call resolution and Csat performance</p> <ul style="list-style-type: none"> • Method of employee feedback • Volume of employee feedback • Action taken from employee feedback <p>How satisfied CSRs are with their recognition program for motivating them to improve call resolution and Csat performance</p> <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their CSR recognition program • Action taken from employee feedback <p>Show the link between their FCR/Csat performance and their recognition program</p> <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their CSR recognition program • FCR and Csat performance after implementing their CSR recognition program

Executive Track Details – Day 3, continued

Thursday, May 19th, cont'd – CDA Resort Convention Center, Boardroom 5ABC

<p>Standard Operating Practice</p> <p>2:30 pm – 3:30 pm</p>	<p>Session: Standard Operating Practice</p>
	<p>Speaker: Patsy Bertoia, Managing Director, Customer Experience & Global Trade Services, FedEx Express Canada</p>
	<p>Describe how they standardize, document, and measure their operating practices</p>
	<ul style="list-style-type: none"> • Who owns the standard operating practices • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements
	<p>How they incorporate customer feedback into their standard operating practice</p>
	<ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
	<p>Describe the standard operating practices strategy</p> <ul style="list-style-type: none"> • Key differentiators that enable the achievement of consistent employee and customer satisfaction numbers

Management Track Details – Day 3

Thursday, May 19th – CDA Resort Convention Center, Bay 2

<p style="text-align: center;">CSR Recognition Program</p> <p style="text-align: center;">9:00 am – 10:00 am</p>	<p>Session: CSR Recognition Program</p>
	<p>Speaker: Emily Fair, Director of Customer Service, BlueCross BlueShield of Vermont</p>
	<p>Describe how their CSR recognition program works</p> <ul style="list-style-type: none"> • Who owns the program • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements
	<p>How they know what motivates each of their CSRs to improve their call resolution and Csat performance</p> <ul style="list-style-type: none"> • Method of employee feedback • Volume of employee feedback • Action taken from employee feedback
	<p>How satisfied CSRs are with their recognition program for motivating them to improve call resolution and Csat performance</p> <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their CSR recognition program • Action taken from employee feedback
	<p>Show the link between their FCR/Csat performance and their recognition program</p> <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their CSR recognition program • FCR and Csat performance after implementing their CSR recognition program
	<p>Session: Standard Operating Practice</p>
	<p>Speaker: Patsy Bertoia, Managing Director, Customer Experience & Global Trade Services, FedEx Express Canada</p>
	<p>Describe how they standardize, document, and measure their operating practices</p> <ul style="list-style-type: none"> • Who owns the standard operating practices • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements
	<p>How they incorporate customer feedback into their standard operating practice</p> <ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
<p>Describe the standard operating practices strategy</p> <ul style="list-style-type: none"> • Key differentiators that enable the achievement of consistent employee and customer satisfaction numbers 	
<p style="text-align: center;">Standard Operating Practice</p> <p style="text-align: center;">10:00 am – 11:00 am</p>	

Management Track Details – Day 3, continued

Thursday, May 19th, cont'd – CDA Resort Convention Center, Bay 2

<p>Quality Assurance Program</p> <p>11:15 am – 12:15 pm</p>	<p>Session: Quality Assurance Program</p>
	<p>Speaker: Jennie Bradley, Director, Quality and Corporate Communication, Millennium1 Solutions</p>
	<p>Describe how their quality assurance program works</p> <ul style="list-style-type: none"> • Who owns the quality assurance program • What are the objectives • Describe how the best practice works • What investments / resources it requires • Key lessons learned • Mistakes to be avoided • Future improvements
	<p>How they incorporate customer feedback into their quality assurance program</p> <ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
	<p>How satisfied CSRs are with their quality assurance program for helping them improve their call resolution/Csat performance</p> <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their quality assurance program • Action taken from employee feedback
	<p>Show the link between their FCR/Csat performance and their quality assurance program</p> <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their quality assurance program • FCR and Csat performance after implementing their quality assurance program
	<p>Session: CSR Coaching Program</p>
	<p>Speaker: Austin Cobb, Vice President Customer Service, Nationstar Mortgage</p>
	<p>Describe how their CSR coaching program works</p> <ul style="list-style-type: none"> • Who owns the CSR coaching program • What are the objectives • Describe how the best practice works • What investments / resources does it require • Key lessons learned • Mistakes to be avoided • Future improvements
	<p>How they incorporate customer feedback into their CSR coaching program</p> <ul style="list-style-type: none"> • Method of customer feedback • Volume of customer feedback • Action taken from customer feedback
<p>How satisfied CSRs are with their coaching program for helping them improve their call resolution/Csat performance</p> <ul style="list-style-type: none"> • Method of gathering employee feedback • Volume of employee feedback • CSRs' satisfaction ratings with their CSR coaching program • Action taken from employee feedback 	
<p>Show the link between their FCR/Csat performance and their CSR coaching program</p> <ul style="list-style-type: none"> • FCR and Csat performance prior to implementing their CSR coaching program • FCR and Csat performance after implementing their CSR coaching program 	
<p>CSR Coaching Program</p> <p>1:30 pm – 2:30 pm</p>	

Management Track Details – Day 3, continued

Thursday, May 19 th cont'd – CDA Resort Convention Center, Bay 2	
<p>TCPA Compliance</p> <p>2:30 pm – 3:30 pm</p>	Session: TCPA Compliance
	Speaker: Christine M. Reilly, JD, Partner, Manatt, Phelps & Phillips, LLP
	Describe how to follow TCPA compliance
	<ul style="list-style-type: none"> • TCPA legislation as it applies to surveying data • Critical items that need to be complied with as call lists are generated • Implications for cell phones versus landlines • Compliance requirements according to survey methodology • Scope of consent

Introducing the New mySQM™ Web Portal Details – Day 3

Thursday, May 19 th – CDA Resort Convention Center, Bay 1A	
<p>Introducing the New mySQM™</p> <p>Session 1: 9:00 am – 11:00 am</p> <p>Session 2: 1:30 pm – 3:30 pm</p>	Session: Introducing the New mySQM™
	mySQM™ is changing. Be the first to see the difference
	<ul style="list-style-type: none"> • Customizable landing page • New filtering structure • Personalized access levels <p><i>Sessions 1 and 2 will be repeats of one another in case you are unavailable during one of the session times</i></p>

CSR Appreciation Day Details for Day 3

Customer Service Representatives can choose 1 of the following activity packages to enjoy a day of fun in appreciation of the job they do! Activity shuttles, meals and awards gala dinner are included with each package.

Float Plane Package (NEW for 2016!!)	<p>This 80-mile, 40-minute flight starts out at the north end of Lake Coeur d'Alene and then proceeds north to cover Hayden Lake, Lake Pend Oreille and Farragut State Park. On this flight you will also see the Cabinet and Selkirk Mountains, the Clark Fork and Pend Oreille Rivers, the city of Sandpoint, Schweitzer Mountain Resort, Spirit Lake, Mt. Spokane Ski Resort, Twin Lakes and then back over the city of Coeur d'Alene. Enjoy a picnic lunch at CDA Resort's Lakeview Terrace following the flight.</p>
Zip Line Tour (NEW for 2016!!)	<p>Seven lines, two sky bridges and views that are out of this world are what make Timberline Adventures the ultimate outdoor experience in Coeur d'Alene. A Yamaha Viking UTV will be waiting for you upon arrival at the property. An exciting mile long drive with an 800ft vertical foot climb is what lies between you and your first step off our platform and into the sky. You will soar from tree to tree for 2 to 2.5 hours before ending the course with an epic surprise. Enjoy a picnic lunch at the CDA Resort's Lakeview Terrace following the adrenaline rush.</p>
Horseback Riding Package (NEW for 2016!!)	<p>Escape to a quieter world as our gentle horses take you on leisurely paced hour to hour and a half mountainous trail ride. Breathe deep and smell the clean air scented with pine. Watch closely as you ride along and see how many different wild flowers you can see. With a little luck you may also catch a glimpse of a wild turkey or white tail deer. Ranch dogs will entertain you as they playfully dash about looking for tree squirrels. Friendly guides accompany all rides to help point out little things easily missed, share their knowledge of the area and to help ensure a safe ride.</p>
Outdoor Adventure Package	<p>The perfect outing to complement your visit to Coeur d'Alene. Begin your adventure with a road bike tour of Centennial Trail that follows along Lake Coeur d'Alene, with stunning views of the lake and the surrounding city from Higgens Point. Enjoy a picnic lunch at the CDA Resort's Lakeview Terrace, and afterwards travel to the shores of Lake Coeur d'Alene on a guided kayak tour. The highlights of this paddle includes seeing the nesting osprey and floating amongst the quiet serenity of nature on the lake.</p>
Sushi, Sake and Beverly's Wine Tour & Tasting	<p>Guests will enjoy learning how to prepare the ingredients needed for rolling sushi and how to utilize different ingredients in different rolls. Using items known to traditional sushi guests will enjoy an educational time and will get to experience delicious food. Paired with each course is a sake tasting. This class is perfect for someone with an adventurous palate. All cooking demos come with personal cookbooks to follow along with the chef's instruction and to reproduce at home. Then tour our famous wine cellars with our Sommeliers tasting wine, and defining your own wine-style and distinct palate.</p>
Golf Coeur d'Alene Course	<p>It's one of the best-known icons in golf – the Famous Floating Green on the 14th hole. Arrive by water taxi, greeted by your personal forecaddie. The lake is a gorgeous backdrop – as well as a formidable challenge. The expertly groomed course compliments your game. The superb attention to service makes you a VIP, every time you play. The experts at Golf Digest, Golf Magazine and Conde Nast Traveler agree – this is one of the world's best golf experiences. Your round includes a custom cart, forecaddie, a range massage, unlimited privileges on the over-the-water driving range on day of play, and lunch at the Floating Green Restaurant.</p>
Body Treatments at Coeur d'Alene Spa	<p>Choose from a variety of relaxing body treatments and salon and beauty services. The Coeur d'Alene Resort's signature therapies come from the seasons and moods of the great Northwest. Choose 1 of the below 3 options to indulge in for your special day at the spa!</p> <p>1) Tips & Toes, Wash & Style: Enjoy a manicure, pedicure, professional wash and style, and a spa lunch overlooking Lake Coeur d'Alene.</p> <p>2) Northwest Experience: Choice of a Swedish Massage (based on the western concepts of anatomy & physiology as opposed to energy work that is more common in Asian style massage), or a European facial (a deep cleansing treatment for the face & neck, to improve the look, feel, and health of the skin). Enjoy a Spa lunch overlooking Lake Coeur d'Alene, followed by a manicure or pedicure.</p> <p>3) Spa Sampler: Choice of Soaking Mineral Bath or Pure Essence Shower, combined with our express Vitamin C Facial, Express Massage, and spa lunch in the bistro overlooking Lake Coeur d'Alene.</p>