



2017 EVENT GUIDE

18th Annual Customer Experience Conference and Industry Awards



**SPARKLING HILL RESORT
VERNON, B.C. MAY 2ND - 4TH 2017**

TABLE OF CONTENTS

1	Table of Contents
2	About SQM Group
3	Letter from SQM's President
4	Award Winners & Finalists Listings
11	Agenda Overview
15	Conference Speakers
21	Contact Center of the Year
22	Best Performing Small- to Mid-Sized Contact Center
23	Great CX Stories
29	Entertainment
30	Exhibitors
34	CSR Appreciation Day



CUSTOMER EXPERIENCE EXPERTS

Since 1996, Service Quality Measurement (SQM) Group has been a leading North American customer experience research, consulting, and performance awarding firm. SQM's primary purpose is to help organizations accurately measure, improve Customer Experience (CX) and to recognize organizations that have demonstrated CX excellence. SQM enjoys a 95% client retention rate and over 70% of our contact center tracking clients improve their contact center's CX year-over-year.

SQM has two state-of-the-art research contact centers, with one located in Coeur d'Alene, Idaho and the other in Vernon, British Columbia, to conduct professional perception and transaction surveys. Annually, SQM conducts 1.5 million surveys with customers who have used a call center, email, website, IVR, or retail site contact channel. In addition, SQM conducts over 25,000 surveys annually with employees who work in contact centers. SQM conducts all phone surveys using our own dedicated workforce. At SQM, we have world class employee satisfaction ratings for our Telephone Survey Representatives and very high employee retention.

SQM benchmarks over 500 leading international contact centers on an annual basis and has been conducting CX benchmarking studies since 1996. SQM's customer and employee contact center research database is one of the largest in North America. SQM does business in 15 countries around the globe including Canada, United States, Argentina, Australia, India, Philippines, Costa Rica, Mexico, Dominican Republic, and Jamaica.

SQM benchmarks and tracks all the major contact channels (i.e., website, call center, IVR, email, and site). Our site contact channels include branch, retail store, dispatching, and service work. By conducting contact channel benchmarking and tracking studies, organizations can get valuable insights into their CX using these contact channels individually or using multiple contact channels to get their order, inquiry, or problem resolved. SQM is recognized as the contact center industry Voice of the Customer (VoC) gold standard expert for measuring and improving CX.

SQM provides consulting expertise to assist organizations in their CX improvement efforts. SQM can validate if your contact center practices are best practices. SQM's best practices are based on our award-winning contact centers' best practice standards. A best practice validation must have a positive impact on CX. Our understanding of people, process, and technology best practices for improving CX is unsurpassed in the contact center industry. SQM also assists organizations in conducting CX journey mapping. The primary purpose of CX journey mapping is to conduct VoC survey research and in-depth interviews with customers to understand what they experience for each interaction and touchpoint key moments of truth and, most importantly, to discover CX improvement opportunities. SQM's CX improvement cycle (e.g., identify, develop, check, and act) assists in helping organizations to develop and execute a CX improvement plan.

LETTER FROM SQM'S PRESIDENT

Dear SQM Guest,



Thank you for choosing to attend **SQM's 18th Annual Customer Experience Research and Best Practices Conference with the most prestigious North American Contact Channel Industry Awards of Service Quality Excellence**. SQM's 2017 Conference is about sharing ground-breaking contact channel research and best practices for improving customer experience based on award-winning contact centers. This year we are excited to be hosting a sold-out event at Sparkling Hill Resort.

SQM is pleased to announce our 2016 award-winning organizations and frontline employees. Each year, we recognize organizations that have demonstrated excellence in customer and employee experience. At this year's awards ceremony, we will recognize 49 organizations with over 60 different awards including Contact Center of the Year, FCR Improvement, World Class FCR Certification, Highest Employee Satisfaction (Esat), Highest Customer Service, Customer Experience Leaders, and Industry Best Practice Awards.

We will also recognize the Top 25 World Class CSR Finalists who are the "best of the best" World Class Certified CSRs, and of those 25 CSRs, we will announce the 2016 CSR of the Year and the two runner-ups. The CSR of the Year will be given \$1,000 in cash at the awards ceremony. SQM will also recognize the Top 5 World Class Call CSR Improvement Winners. In addition, we will be recognizing the Top 6 World Class Supervisors who are the "best of the best" World Class Certified Supervisors, and of those 6 Supervisors, we will announce the 2016 Supervisor of the Year. The Supervisor of the Year will be given \$1,000 in cash at the awards ceremony. We believe that Supervisors are a key ingredient to creating World Class contact center performance.

At this year's conference, SQM will be releasing our latest book, the second edition of **One Contact Resolution – Customer Experience Research and Best Practices**, written by Mike Desmarais and Lara Pow. The purpose of this book is to help contact center managers improve their contact channels' customer experience. The book showcases ground-breaking customer research on contact channel (e.g., call center, email, chat, web self-service, and IVR self-service) customer experiences for resolving an inquiry or problem and highlights the Top 10 customer experience metrics research (i.e., first contact resolution, one contact resolution, contact resolution, channel customer satisfaction, customer emotion experience, omni-channel experience, seamless experience, enterprise wide Csats, Net Promoter Score®, and net retention index). The book also provides 16 best practice case studies from award winning organizations. This book is valued at \$499 but every participant of the Management and Executive tracks will receive a free copy.

In closing, I would like to congratulate each of the award-winning organizations and their World Class Certified CSRs and Supervisors. Your world class performance is vital to the success of your organization!

Sincerely,

A handwritten signature in black ink that reads "Lara Pow".

Lara Pow
President, SQM Group

CONTACT CENTER OF THE YEAR AWARD

	Organization:	Criteria:
Winner:	Canadian Tire Financial Services (CRCC)	Criteria used for Contact Center of the Year are based on having the highest combined customer FCR and employee overall very satisfied (top box response) rating.
Finalists:	Jackson	
	VSP Vision Care	

BEST PERFORMING SMALL- TO MID-SIZED CONTACT CENTER AWARD

	Organization:	Criteria:
Winner:	BlueCross BlueShield of Vermont	Criteria used for Best Performing Small- to Mid-Sized Contact Center (under 100 CSRs) are based on having the highest combined customer FCR and employee overall very satisfied (top box response) rating.
Finalists:	Canadian Tire Roadside Assistance	
	TELUS Sourcing Solutions Inc.	

CONTACT CENTER WORLD CLASS FCR CERTIFICATION

407 ETR	Jackson
Blue Cross and Blue Shield of Alabama (Federal Employee Program)	Marchon Eyewear Inc.
Blue Cross and Blue Shield of Kansas	Millennium1 Solutions (Credit Card Sales Segment)
Blue Cross Blue Shield of Massachusetts (Retail Sales and Retention)	Prime Therapeutics (Nebraska & New Mexico)
BlueCross BlueShield of Vermont	Rogers Enterprise Service Delivery
Canadian Tire Financial Services (CRCC)	Scotiabank (Nova Scotia)
Enbridge Large Business Accounts	Scotiabank International (Dominican Republic)
Florida Blue (Federal Employee Program)	Security Health Plan
FortisBC	Sun Life Financial Group Retirement Services (Waterloo)
Genworth Long Term Care Customer Service	VSP Vision Care (California & Ohio)
Criteria: Criteria used for Contact Center World Class FCR Certification are 80% or higher of the calls are FCR for 3 months or more. SQM's FCR call criteria are based on the customer's call being resolved on the first call.	

WEB SELF-SERVICE WORLD CLASS FCR CERTIFICATION

Organization:	Criteria:
FortisBC	Criteria used for Web Self-Service World Class FCR Certification are 80% or higher of the contacts are FCR for 3 months or more. SQM's FCR contact criteria are based on the customer's contact being resolved on the first website visit.

CUSTOMER EXPERIENCE BEST PRACTICE AWARD WINNERS

Category:	Organization:
Omni-Channel	BlueCross BlueShield of South Carolina
Web Self-Service Channel	FedEx Express Canada
Quality Assurance	Prime Therapeutics
Desktop Application(s)	Comcast Cable
CSR Recognition Program	Canadian Tire Financial Services
Career Development Program	UPMC Health Plan
Call Handling	VSP Vision Care
Escalation CSR Support	Capital One
Performance Management System	Scotia iTRADE
CSR Coaching Program	Nationstar Mortgage
CSR Training Program	BlueCross BlueShield of Vermont
CSR Selection	Accenture Business Services for Utilities Inc.
Standard Operating Procedures	Genworth Financial, Inc.
	PerformRx
Continuous Improvement Process	Millennium1 Solutions
Criteria: These awards recognize organizations that have demonstrated they have improved or helped maintain high FCR and Csat performance. Organizations submit specific practices they have used to improve or maintain high customer experience performance.	



CSR TOP 5 WORLD CLASS CSAT IMPROVEMENT WINNERS

Name:	Organization:	Criteria:
Shaquana McEachin	BlueCross BlueShield of North Carolina	To be eligible the customer service representative (CSR) must have improved their World Class Call (WCC) performance by 10% from the previous year. SQM's WCC criteria are based on the customer's call being resolved and the customer is overall very satisfied (top box response) rating with the CSR. Call center management must also send an example of a great customer service story that the CSR delivered.
Steve Couper	Cogeco Connexion	
Brenton Dunkley	Rogers	
Amanda Watson	Sun Life Financial	
Jeanne Dea	VSP Vision Care	

CSR FINALISTS FOR CSR OF THE YEAR

Name:	Organization:	Criteria:
Alex Beeks	BlueCross BlueShield of South Carolina	To be eligible, a customer representative must be a World Class Certified customer representative. The criteria for a World Class Certified Customer Representative is 85% or higher of the calls surveyed are at the World Class Call (WCC) level. SQM's WCC criteria are based on the customer's call being resolved and the customer is overall very satisfied (top box response) rating with the customer service representative (CSR). Call center management must also send an example of a great customer service story that the CSR delivered.
Ceomara Timmons	BlueCross BlueShield of South Carolina	
Michelle Dobson	BlueCross BlueShield of South Carolina	
Alyssa Pratt	BlueCross BlueShield of Vermont	
Amy Duhamel	BlueCross BlueShield of Vermont	
Bridgette Draper	BlueCross BlueShield of Vermont	
Madison Blow	BlueCross BlueShield of Vermont	
Rebecca Lee	BlueCross BlueShield of Vermont	
Chastity Driscoll	Millennium1 Solutions	
Peter Stewart	Millennium1 Solutions	
Derek Therrell	Prime Therapeutics	
Sebastian D'Agosta	Prime Therapeutics	
Stacey Boone	Prime Therapeutics	
Bernice Gutierrez	Regence BlueCross BlueShield	
Jason Chapman	Regence BlueCross BlueShield	
Mark Gobardhan	Scotia iTRADE	
Roy Wefuan	Scotia iTRADE	
Janet Cramm	Security Health Plan	
Amber Moore	Sun Life Financial	
Daniel Arnold	Sun Life Financial	
Isaac Gillan	Sun Life Financial	
Julie Dion	Sun Life Financial	
Katrine Gagnon	Sun Life Financial	
Melanie Luckhurst	Sun Life Financial	
Melissa McGahey	Sun Life Financial	

SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

Name:	Organization:	Criteria:
Antionietta Perez	407 ETR	To be eligible, the supervisor must be a World Class Certified Supervisor. The criteria for a World Class Certified Supervisor is 85% or higher of the calls surveyed are at the World Class Call (WCC) level. Call center management or CSRs must also send an example of a great Call Resolution or Csat coaching story.
Janalee Willett	BlueCross BlueShield of Vermont	
Muriel Rafuse	Millennium1 Solutions	
Dede Tobin	Regence BlueCross BlueShield	
Prabhjot Bedi	Rogers	
Christopher Longshaw	Sun Life Financial	

CUSTOMER EXPERIENCE & FIRST CALL RESOLUTION AWARDS

Category:	Organization:	Criteria:
Best Selling Customer Satisfaction	Scotiabank	This award recognizes the contact center with the highest Csat (top box response) rating for selling approach.
Highest Enterprise-Wide One Contact Resolution	FortisBC	This award recognizes the organization with the highest enterprise-wide one contact resolution over two or more contact channels, with one being the call center and one being the website.
Highest Omni-Channel Customer Service	Canadian Tire Financial Services (CRCC)	This award recognizes the contact center with the highest overall Csat (top box response) rating where the experience was seamless for the entire multi-channel experience.
Highest Web Self-Service Customer Service	FortisBC	This award recognizes the contact center with the highest overall Csat (top box response) rating for the web self-service channel.
Highest IVR Self-Service Customer Service	FortisBC	This award recognizes the contact center with the highest overall Csat (top box response) rating for the IVR self-service channel.
Highest Field Services Customer Service	Cogeco Connexion	This award recognizes the contact center with the highest overall Csat (top box response) rating for the field services channel.

CUSTOMER EXPERIENCE & FIRST CALL RESOLUTION AWARDS

Highest Customer Service by Industry Awards

Category:	Organization:	Criteria:
Banking	Vancity	Based on an organization having the highest FCR in each specific industry/sector.
Business to Business	Jackson	
Credit Card	Canadian Tire Financial Services (CRCC)	
Energy	FortisBC	
Financial	Jackson	
Government	Halton Region	
Health Care	BlueCross BlueShield of Vermont	
Health Care (Federal Employee Program)	Excellus BlueCross BlueShield	
Helpdesk	Blue Cross Blue Shield of Michigan (Web Support Help Desk)	
Insurance	VSP Vision Care	
Pharmacy	Prime Therapeutics	
Retail/Service	Cogeco Connexion (Storefront)	
Telco/TV	Cogeco Connexion	
	Rogers Business Service	

First Call Resolution Improvement Awards

Organization:	Criteria:
Arkansas Blue Cross and Blue Shield (FEP Operations)	Based on a 5% or greater annual FCR improvement from the most recent study within the last two years.
BlueCross BlueShield of South Carolina (Federal Employee Program)	
BlueCross BlueShield of Tennessee	
BlueCross BlueShield of Texas	
Blue Cross Blue Shield of Arizona	
Blue Cross Blue Shield of Minnesota	
Blue Cross Blue Shield of Wyoming	
Blue Cross of Idaho	
Blue Shield of California	
Cogeco Connexion (Technical Support)	
Genworth Long Term Care Customer Service	
HCL	
Nationstar Mortgage	
Petro-Canada, a Suncor Energy Business	
Rogers Business Service Delivery	
Rogers Business Service Delivery (Stream)	
Scotiabank International (Chile)	
Triple S Salud	
UPMC Health Plan	

EMPLOYEE SATISFACTION AWARDS

Highest Employee Satisfaction for the Contact Center Industry Award

Organization:	Criteria:
Canadian Tire Financial Services (CRCC)	Based on having the highest employee overall very satisfied (top box response) rating with working in their contact center.

Most Improved Employee Satisfaction Award

Organization:	Criteria:
Quantum Management Services Ltd	Based on having the most improved employee overall very satisfied (top box response) rating with working in their contact center.

Highest Employee Satisfaction by Industry Awards

Category:	Organization:	Criteria:
Financial	Canadian Tire Financial Services	Based on having the highest employee overall very satisfied (top box response) rating with working in their contact center for each specific industry/sector.
Health Care	BlueCross BlueShield of Vermont	
Insurance	VSP Vision Care	
Outsourcer	TELUS Sourcing Solutions Inc.	

Highest Work From Home Employee Satisfaction

Organization:	Criteria:
VSP Vision Care	Based on having the highest employee overall very satisfied (top box response) rating for work from home CSRs.

World Class Employee Satisfaction Awards

Organization:	Criteria:
BlueCross BlueShield of Vermont	Based on 50% or higher of employees rating their overall experience of working in the contact center as a very satisfied (top box response) rating.
Canadian Tire Financial Services (CRCC & CSG)	
Canadian Tire Roadside Assistance	
Jackson	
Scotiabank (Nova Scotia)	
Security Health Plan	
TELUS Sourcing Solutions Inc.	
VSP Vision Care	

18TH ANNUAL CUSTOMER EXPERIENCE CONFERENCE AND INDUSTRY AWARDS

SQM benchmarks over 500 leading international contact centers on an annual basis and has been conducting customer experience (CX) benchmarking studies since 1996. On an annual basis, SQM conducts 1.5 million surveys with customers who have used a call center, email, website, IVR or retail site contact

both rating questions and follow-up customer feedback questions that can be used to help the organization improve their contact channels' customer experience. SQM's awards are based on customers who have used a contact channel and employees who work in a contact center. SQM conducted the

SQM recognizes contact centers that have demonstrated CX Best Practices for the following categories: Omni-Channel, Web Self-Service Channel, IVR Self-Service Channel, Email Channel, Emerging Channels (e.g., Chat, Video Chat, Mobile Application) Quality Assurance Program, Desktop Application(s),

SQM is pleased to announce our 2016 award winning contact centers and frontline employees. This is SQM's 18th Annual Most Prestigious North American Contact Center Industry Awards.

channel. SQM also conducts over 25,000 surveys annually with employees who work in contact centers. SQM awards organizations that have delivered CX excellence or have significantly improved their CX. SQM's CX awards are based on customers who have used a contact channel and/or employees who work in a contact center. These awards are considered the fairest and most credible CX awards because they are based on VoC survey ratings. We have recognized top performing organizations for CX since 1998.

For each organization that participated in our contact channel benchmarking study, SQM completed 400 post-contact surveys, conducted by SQM's telephone survey representatives. SQM uses an in-depth post-contact customer survey approach that consists of

benchmarking studies for the period of January 1, 2016 to December 31, 2016. SQM has more than 60 different awards that recognize the top performing organizations.

Criteria used for Contact Center of the Year are based on having the highest combined FCR and employee overall very satisfied (top box response) rating. This is the same criteria for Best Performing Small- to Mid-Sized Contact Center (under 100 CSRs).

Criteria used for Contact Center World Class FCR Certification are 80% or higher of the calls are at the world class level for 3 consecutive months or more in 2016. SQM's world class call criteria are based on the customer's call being resolved on the first call to the contact center.

Recognition Program, Career Development, Call Handling Practice, Real-Time CSR Support Queue, Performance Management System, CSR Coaching, CSR Training Program and CSR Hiring Process. These awards recognize organizations that have demonstrated that they have improved or helped maintain high CX performance because of their best practice. Submissions were invited from clients and non-clients through an online application and were judged by a panel of six subject matter experts to determine the finalists and winners.

In closing, SQM would like to congratulate all award winning organizations and their CSRs and Supervisors. Their world class performance is vital to their organization's success!

Agenda Overview		
Monday, May 1 st – Welcome: Meet and Greet		
Time	Location	Details
5:00 pm – 8:00 pm	Fireside Lounge	SQM welcomes guests to Vernon with an evening of fine wine and appetizers at the Fireside Lounge and Lakeview Patio.
Tuesday, May 2 nd – Day 1 Customer Experience Research & Best Practices		
7:00 am – 10:00 am	PeakFine Restaurant	Breakfast Buffet
8:00 am – 12:00 pm	KurSpa	Relaxation Enjoy the saunas and steam rooms in KurSpa. KurSpa is the largest among luxury spas in Canada and considered by many to be the most unique in the world.
12:00 pm – 2:00 pm	PeakFine Restaurant	Buffet Lunch Appreciate the finest and freshest ingredients the Okanagan Valley has to offer while taking in the stunning lake and mountain views from the PeakFine dining room.
Session 1: 10:00 am – 12:00 am Session 2: 2:00 pm – 4:00 pm	SQM's New VoC Research Center	SQM VoC Research Center Tour Come see SQM's brand new facility, which opened in February of 2017. Staggered groups to be taken on buses throughout the day for a tour of SQM's state-of-the-art VoC research center facility.
1:00 pm – 6:00 pm Exhibitor Spotlight 1: 1:00 pm – 1:20 pm Exhibitor Spotlight 2: 3:30 pm – 3:50 pm	Fireside Lounge	Exhibitor Introduction Visit the Fireside Lounge to view the showcase of exhibitors. The Exhibitor Spotlight is a short 20 minute tour hosted by SQM. Each exhibitor will introduce themselves and explain how they help clients improve FCR and CX. SQM will serve refreshments and snacks. From 4:30 pm to 6:00 pm, each exhibitor will feature a wine from one of the many wineries in the Okanagan Valley, known as the "Napa Valley of the North".
6:00 pm – 10:00 pm	Austria Ballroom	Dinner & Entertainment Enjoy the Taste of the Okanagan with local beer, wine and food. Entertainment by the Young'uns, voted Okanagan Valley's best local music group. Be ready to rock!
Wednesday, May 3 rd – Day 2 Customer Experience Research & Best Practices		
7:30 am – 8:30 am	Breakfast Buffet – PeakFine Restaurant	
8:30 am – 10:00 am	Customer Experience Research Keynote Speaker: Mike Desmarais, Founder & CEO of SQM Austria Ballroom – Available to all conference attendees SQM will share highlights from our 2 nd Edition book, One Contact Resolution, co-written by Mike Desmarais and Lara Pow, President of SQM. This book, to be released at the 2017 Conference, focuses on customer experience research using contact channels to resolve an inquiry or problem. Specifically, Mike will share the Top 10 metrics for measuring and improving customer experience. Based on SQM's research for these Top 10 customer experience metrics, Mike will share insights on customer experiences using contact channels, omni-channel, and the impact it has on an organization's enterprise wide customer satisfaction, referrals, and retention. Customer experience research is based on benchmarking over 500 leading North American contact centers and conducting over 7.5 million phone surveys.	
10:00 am – 10:30 am	Coffee Break – Fireside Lounge Visit exhibitor booths and enjoy coffee and treats	

AGENDA OVERVIEW

	Executive Track – Library Room By invitation only Mike Desmarais, Founder & CEO of SQM, will share customer experience strategy design and best practices. In addition, world class CX leaders will share best practices for improving customer experiences.	Management Track – Austria Ballroom Available to all conference attendees World class leaders from some of the best known organizations in North America will share their best practices for improving or maintaining world class CX/FCR performance.	
10:30 am – 11:15 am	Customer Experience (CX) Strategy – Pulse Check Mike Desmarais, Founder & CEO of SQM	Standard Operating Practices Stephanie Eubank/Angelia Colinger, Genworth	
11:15 am – 12:00 pm	Web Self-Service Channel Patsy Bertoia, FedEx	Continuous Improvement Process Holly Abbott, Millennium1 Solutions	
12:00 pm – 1:00 pm	Lunch Buffet – PeakFine Restaurant		
1:00 pm – 1:45 pm	Standard Operating Practices Stephanie Eubank/Angelia Colinger, Genworth	Web Self-Service Channel Patsy Bertoia, FedEx	
1:45 pm – 2:30 pm	Continuous Improvement Process Holly Abbott, Millennium1 Solutions	Performance Management System Adam Fraser/Michael Riley, Scotia iTRADE	
2:30 pm – 3:00 pm	Coffee Break – Austria Ballroom		
3:00 pm – 4:00 pm	Transforming the Customer Experience Keynote Speaker: Vicki Perryman, Vice President of Global Customer Experience, eBay's Global Customer Operations (former) Austria Ballroom – Available to all conference attendees Customer journeys, which are cross-functional by nature, cut across traditional organizational boundaries and the dynamic to drive change can be tricky to navigate. Vicki has driven transformational customer experience change within several organizations. Learn what succeeded, and failed, in these organizations making the cultural changes required to rewire themselves operationally and financially to put the customer first and manage their journeys more effectively.		
4:30 pm – 6:00 pm	Oktoberfest with the Exhibitors – Fireside Lounge Visit the exhibitor booths for a taste of Oktoberfest. Each vendor will feature a local beer. Visit each exhibitor to find your favorites. Wine and cider will also be available.		
6:00 pm – 10:00 pm	A 'Taste of Austria' Themed Dinner – Austria Ballroom Join us for an evening of lederhosen and schnitzel. Presenting a sampling of the best Austrian culinary creations, complete with potato mash, local vegetables, a side of lingonberry, and apple strudel. Entertainment by Cod Gone Wild. This will surely put you in the Oktoberfest spirit of drinking local beers, eating delicious Austrian food, and having fun!		
Thursday, May 4th – Day 3 Customer Experience Best Practices			
	Executive Track Library Room	Management Track Austria Ballroom	CSR Appreciation Day
8:00 am – 9:00 am	Breakfast Buffet – PeakFine Restaurant		Breakfast – Predator Ridge
9:00 am – 10:00 am	Contact Center of the Year for 2016 – Canadian Tire Financial Services Keynote Speaker: Dave DiFelice, Vice President, Customer Service and Operations Austria Ballroom – Available to all conference attendees Learn how Canadian Tire Financial Services achieved world class FCR and employee satisfaction and, as a result, became Contact Center of the Year.		CSR Appreciation Day Activities Available Body Treatments at KurSpa Golf Predator Course Zip Line Tour Wine Tour Yoga & Hiking Cooking & Wine Class
10:00 am – 10:30 am	Coffee Break – Fireside Lounge Visit exhibitor booths and enjoy coffee and treats		
10:30 am – 11:15 am	CSR Training Janalee Willett, BCBS Vermont	CSR Call Handling Steven Holt, VSP Vision Care	
11:15 am – 12:00 pm	Career Development Anne Palmerine, UPMC Health Plan	Escalation CSR Support David Wilson, Capital One	

	Executive Track Library Room	Management Track Austria Ballroom
12:00 pm – 1:00 pm	Lunch Buffet – PeakFine Restaurant	
1:00 pm – 1:45 pm	Quality Assurance Program Rick Lane, Prime Therapeutics	CSR Training Janalee Willett, BCBS Vermont
1:45 pm – 2:30 pm	CSR Call Handling Steven Holt, VSP Vision Care	Career Development Anne Palmerine, UPMC Health Plan
2:30 pm – 2:45 pm	Coffee Break – Library Room	Coffee Break – Fireside Lounge
2:45 pm – 3:30 pm	Escalation CSR Support David Wilson, Capital One	Quality Assurance Program Rick Lane, Prime Therapeutics
Awards Ceremony Celebration & Gala Dinner		
5:00 pm – 6:00 pm	Fireside Lounge & Austria Ballroom	Wine Reception Mingle in the lounge and enjoy a glass of wine before the main event. The Okanagan Valley region has over 120 wineries and is considered the “Napa Valley of the North” with many of the wineries winning international wine awards.
6:00 pm – 12:00 am	SQM Awards Gala Tent at Sparkling Hill	Awards Ceremony & Gala Dinner Semi-Formal Attire – Black Tie Welcome This is SQM’s 18th Annual Most Prestigious North American Contact Channel Customer Experience 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: <ul style="list-style-type: none"> • Contact Center of the Year • Best Practices • Contact Center Customer and Employee Satisfaction • World Class Contact Center Certification • World Class Customer Representative and Supervisor Certification • First Call Resolution Improvement • Customer Service Representative of the Year and Top 24 Finalists • Supervisor of the Year and Top 5 Finalists ...and many more! Featuring The Legendary Lake Monsters A dynamic and entertaining horn driven 11-piece party/dance band. Featuring 6 Driving Horns, 3 Tasty Vocalists, a Super Tight Rhythm section, rounded off by a Hammond B3 organ plus Keys.

SQM CONFERENCE SPEAKERS



MIKE DESMARAIS

Founder and Chief Executive Officer SQM Group

Mike Desmarais is the Founder and Chief Executive Officer of SQM Group. Mike has over 25 years of customer experience measurement, benchmarking, and consulting experience. As a consultant, Mike has experience working with leading North American organizations on improving customer experience. Mike has developed 15 best practices that are fundamental to providing world class contact channel customer experience. He uses his best practice knowledge to assess contact channel operations and to pinpoint the 3-5 pivotal changes that will drive real and significant customer experience improvement. Mike is a pioneer and visionary for contact channels' customer experience measurement of first call resolution, one contact resolution, omni-channel, customer emotion, and retention metrics. Mike has written five thought-provoking contact channel customer experience books (i.e., World Class Call Center, First Call Resolution, FCR Best Practices, One Contact Resolution, and most recently, One Contact Resolution 2nd Edition). Mike has conducted best practice case studies with organizations such as American Express, FedEx, Canadian Tire, Blue Cross Blue Shield, and VSP Insurance. In addition, Mike is a popular contact center industry thought leader with over 13,000 LinkedIn followers and is one of the top 10 most influential contributors in the contact center industry based on a recent Fonolo poll. Mike is a sought-after speaker for contact center conferences and has a world class satisfaction rating for speaking at those events.



ANDREA POW

Senior Vice President of Client Advocacy
SQM Group

Andrea Pow, BComm, is the Senior Vice President of Client Advocacy of SQM Group. She has her bachelor's degree in General Business with a focus in Marketing and Organizational Behaviour/Human Resources. Her experience includes research and development of new certification and training programs, developing industry specific training for organizations and managing quality assurance control. She brings over

10 years of customer relations, business and training development experience. Her responsibilities include customer account management and business development.



NADER GHATTAS

Vice President of Consulting
SQM Group

Nader Ghattas, BMgmt, is the Vice President of Consulting of SQM Group. He has an honours degree in business management from UBC and brings nearly a decade of consulting, corporate asset direction and extensive international business experience to SQM. He started his career as a TSR at SQM, and moved on to vocations in investment banking, supply chain management and international business where he

developed a passion for languages and a strong commitment to client service. Nader jumped at the opportunity to again be a part of the customer-centric team at SQM Group, and is thrilled to take on responsibilities in customer account management and business development.



ADAM FRASER

Sales Advisor
Scotia iTRADE

Adam Fraser has been the Senior Sales Advisor at Scotia iTRADE for just over a year. Adam has a Bachelor of Commerce from Queen's University and over 10 years of experience in the Financial Services industry. Having previously worked as a Financial Advisor, Adam joined Scotia iTRADE over 5 years ago where he has held multiple Business Development and Coaching roles. Adam's customer experience focus,

coupled with his extensive sales experience has helped him act as a Sales Effectiveness lead. His objectives include developing client-centric sales and service processes and sustaining them through the creation of coaching, training and performance management strategies.



ANGELIA COLINGER
Senior Technical Writer
Genworth

Angelia Colinger has worked in the call center industry for 14 years. She began her career at Genworth, 10 years ago, as a Transaction Management Representative for Licensing & Commissions and then became a Trainer in the same business area. As a trainer, she was also responsible for creating and maintaining SOPs and discovered she had a passion for Technical Writing. After being a Trainer for four years, Angelia became a Senior Technical Writer for Customer Service. Her experience as a Processor and Trainer gave her not only the insight and the ability to write informative, easy to follow, and accurate Standard Operating Procedures, but also the business acumen to understand call center operations procedural priorities.



ANNE PALMERINE
Associate Vice President, Customer Engagement and Enrollment Services
UPMC Health Plan

Anne Palmerine is the Associate Vice President of Customer Engagement and Enrollment Services for UPMC Health Plan. Anne has led UPMC Health Plan in Customer Service for the past fourteen years, including Enrollment and Retail. Anne has managed in customer service call centers for the past 24 years with a focus on customer retention, growth, and sales. She has a bachelor's degree from West Virginia University and an MBA from the University of Pittsburgh.



DAVE DIFELICE
Vice President, Customer Service and Operations
Canadian Tire Financial Services

As Vice President of Customer Service & Operations for Canadian Tire Financial Services, Dave DiFelice oversees Canadian Tire's award-winning contact centres. Once again, Canadian Tire has won the Contact Center of the Year award and achieved the highest employee satisfaction level within the industry.

With more than 20 years of contact centre experience, and an award-winning track record, Dave has earned his stripes as an industry leader. After completing his MBA from McMaster University in Canada in 1995, Dave joined Canadian Tire as a Scheduler in one of its call centres. Dave worked in several areas of the company over his tenure, including Human Resources, Marketing, and various Analytic roles, because he wanted to get a holistic perspective on what it took to make a good call centre great.



DAVID WILSON

Director of Operations, Service Delivery **Capital One Canada**

David Wilson is an accomplished Customer Service Specialist and Entrepreneur with a long career in global business operations, project management, and elevating the customer experience. Working in both public and private sectors, he has held diverse leadership roles consistently exceeding KPI benchmarks, elevating customer satisfaction, and driving continual process improvement through the use of technology and implementation of industry best practices. In addition to his substantial professional experience, his credentials include a Bachelor's degree in Music, an NPS2 certification, certifications as a Scrum Product Manager, Product Owner, and Net Promoter Associate and professional development in procurement, experience mapping, and design thinking.



HOLLY ABBOTT

Director, Customer Experience & Corporate Communication **Millennium1 Solutions**

Holly Abbott is the Director, Customer Experience & Corporate Communication for Millennium1 Solutions. She has over 19 years of client service and executorial experience across various industry verticals in the BPO space. She is known for her ability to develop customized experiential measurement systems that meet unique client requirements and has contributed to multiple performance, VoC, and efficiency gains for her client partners and was recognized by SQM with an FCR Champion award in 2016. She will be sharing details of Millennium1 Solutions' Best Practice Award winning approach to Continuous Improvement.



JANALEE WILLETT

Call Center Supervisor and Ulysses Master Coach **BlueCross BlueShield of Vermont**

Janalee Willett has been with BlueCross BlueShield of Vermont for 17 years. During this time she has held various roles in the call center, from call center representative, quality assurance and training specialist, to her current role as call center supervisor and Ulysses Master Coach. Janalee manages a world class certified call center and has experience in process improvement, employee coaching and development, classroom facilitation and developing an engaged, motivated and highly functioning workforce. Janalee's leadership has assisted the BlueCross BlueShield of Vermont's call center in achieving SQM world class certification for three consecutive years, has been a top performing Blue Plan for FCR results for two years, and was awarded the best performing small to midsize contact center in 2015. Janalee was a 2014 SQM finalist for Supervisor of the Year and the 2015 BCBSVT Employee of the Year.



MICHAEL RILEY
Director, Business Solutions
Scotia iTRADE

Michael Riley is the Director of Business Solutions for Scotia iTRADE, Canada's home for active traders and do-it-yourself investors. He has almost 20 years of financial services experience with an in-depth knowledge of contact centers, securities related products & services, industry practices & regulations and the technologies that support this ever-evolving business. He began his career with Manulife servicing small to medium sized US plan sponsors of 401(k) plans and then transitioned to BMO Nesbitt Burns as an Investment Associate in a fast-paced full-service brokerage. For over a dozen years he has worked for Scotiabank's discount brokerage in various roles closely tied to the contact center environment. In addition to his duties around contact center operations he also currently oversees the brokerage's analytics and reporting functions and contributes to several strategic initiatives like Scotia iTRADE's Omni-channel strategy.



PATSY BERTOIA
Managing Director, Customer Experience & Global
Trade Services
FedEx Express Canada

Patsy Bertoia's primary responsibility is to ensure every experience a customer has with FedEx is outstanding. As Managing Director of FedEx Express Canada's three customer contact centres and Global Trade Services teams, Bertoia and her team of 900 service and advisory professionals help connect Canadian businesses with Canadians and the world every day. She is instrumental in developing best practices that have led FedEx Express Canada to be the only employer in Canada to be certified 13 times, including a record eight straight "platinum" designations in a row. Bertoia was also the recipient of the Exceptional Customer Service Experience award in 2014 by the Customer Service Professional Network.



RICK LANE
Director of Training and Quality
Prime Therapeutics

Rick is a Master Trainer and Quality Expert who has the added advantage of being our resident expert in Speech and Text Analytics. Rick partners with our Clients, Members, Specialists, and Operational Leaders to foster a human-to-human contact. After spending twenty-two years in the Air Force in various positions including an assignment at the Pentagon developing policy for his career field, he retired honorably and transitioned to contact center management. He has over a decade of experience in Contact Centers, first with Brinks Home Security, and then ADT Security before transitioning to Prime Therapeutics six months ago.



STEPHANIE EUBANK
Senior Technical Writer
Genworth

Stephanie Eubank started as a technical writing intern at Genworth in March of 2015 while she completed her Master of Arts in Strategic Communication. She accepted a position as a Senior Technical Writer at Genworth in April of 2016. In her short career, so far, she has used her passion for assisting phone representatives and processors and her knowledge of communication to create and manage Standard Operating Procedures. Her favorite aspect of her job is knowing that the documentation enables Genworth employees to do their jobs well, meeting customers at their point of need.



STEVEN HOLT
Training Supervisor
VSP Vision Care

Steven Holt is the training supervisor for VSP's Customer Care division where he oversees training for its 600 seat call center. Last year his training team was recognized for its immersive training design for VSP's call center (SQM Best Practice 2015). Steven has been a part of the VSP organization for over 18 years in a variety of roles beginning with Human Resources and for the last five years has been a leader in the call center and claims business areas.



VICKI PERRYMAN
Vice President of Global Customer Experience
eBay's Global Customer Operations (former)

Vicki Perryman is a results-oriented, high energy executive successful at building global organizations and transforming business performance in fast changing environments. She appreciates and enjoys driving creative customer experience strategies that support business profitability, growth, scale, and employee engagement. As eBay's Vice President of Global Customer Experience, Vicki led eBay's Global Customer Operations organization, spanning seven functions across strategy, planning, and daily operations throughout North America, Europe, and Asia Pacific. She was with eBay for five years through late 2016.

Contact Center of the Year

CANADIAN TIRE FINANCIAL SERVICES

AT CANADIAN TIRE FINANCIAL SERVICES (CTFS), every representative at its award-winning Customer Relationship Contact Center (CRCC) is fully aligned with the mission to deliver world-class customer service. CTFS has created a 'Customer for Life' culture that built on delivering high-quality and consistent: service experiences, first call resolution (FCR) performance, and employee engagement programs.

The results they have achieved through this approach are impressive: a 97% employee satisfaction/engagement rate, and an average employee tenure rate of 12 years. One only needs to look inside their CRCC team to see some of the elements (shown below) that contribute to their award-winning, high-performance team.

- **A sustained and company-wide commitment to its 'Customers for Life' culture.** Creating Customer for Life, is the number-one focus of every employee at CTFS. This culture is reinforced daily through team- and peer-recognition activities, such as the Customers for Life awards. This peer-nominated award is presented throughout the year to serve as an individual commendation for promoting the culture as well as a company-wide reminder of the importance of making 'customer-focused' choices.
- **A strong Employee Engagement and Recognition Program.** CTFS celebrates their people through formal engagement and recognition programs. They provide their employees with incentives and opportunities to expand their contribution and scope of responsibilities, beyond their regular day-to-day jobs. In addition, they are committed to providing their employees with a vast array of health and wellness programs to ensure this important aspect of their team's life is supported and nurtured.
- **A highly-empowered front line team.** FCR is a core component of CTFS' 'Customers for Life'

culture. Their contact centre representatives know that taking care of their customers' needs is a top priority, and they are empowered to take the time and initiative to address them. In addition, they are provided with ongoing training, coaching and resources to support their success. For example, they are provided with training on effective customer relationship strategies, based on well-established theories, such as Behavioural Economics.

- **An employee-driven approach to continuous improvement and innovation.** The CRCC team is empowered to identify and report important business improvements ideas (customer service, marketing and operations) in order to help drive the team and the company's shared success. The CRCC team is actively involved in improving FCR and reducing customer effort. They regularly participate on process improvement projects, from idea generation and development through to solution design and implementation.
- **A strong connection to the local community.** As one of the largest employers in the Niagara region, CTFS extends its 'Customers for Life' culture to its local communities. It does so by providing financial and volunteer support to local charitable and non-profit organization. In fact, the focus on investing back into the community is another key contributor listed by employees for CTFS high employee satisfaction and longevity.

Overall, CTFS' strong performance lies in the strength of its CRCC team and their dedication to fostering its Customer for Life culture—built on delivering world-class customer service. All of which would be for naught without CTFS' unwavering commitment to delivering effective employee engagement, empowerment and recognition programs, as well as continuous improvement initiatives.

Best Performing Small- to Mid-Size Contact Center

BLUECROSS BLUESHIELD OF VERMONT

BlueCross BlueShield of Vermont is committed to helping customers navigate the healthcare system, providing exceptional customer experiences, and seeing our member's issues through to resolution. Advocating for our members, ensuring first call resolution (FCR) and fostering positive relationships with both our internal and external customers is engrained in our cooperate culture throughout our organization. This member centric focus has simply become the way we do business. Building blocks crucial to our success include:

Fostering a member experience corporate culture through training:

Our We C.A.R.E. training program is an annual service quality education program developed to promote a culture of caring for our members' experience and to improve the skills we must use to create that experience. All BCBSVT employees, including executives, are required to complete the We C.A.R.E. training program. In addition, Don George, our President and CEO, conducts quarterly town hall meetings providing all employees with updates on the Plan's current state, future goals and how they tie back to enhancing the member experience. This level of engagement from the President of BCBSVT helps to maintain the Company's primary focus, our members, while fostering a collaborative and engaging work environment.

Customer Service new hire training:

To help ensure our training is a success, we immediately incorporate the member experience as a primary focus on day one, and every day after that. Every subject and topic gets tied back to the member experience and ensuring first call resolution. This level of focus helps to engrain our member centric culture into our CS trainees. By the time they come to the floor, there is no question regarding what is most important to our call center, providing an exceptional member experience and ensuring their call is accurately and thoroughly resolved.

Call handling practices:

Our call center supports a concierge service model, coaching our CSR's to take the member out of the middle, make proactive calls on behalf of members and perform three way conference calls when necessary. We make every effort to serve as an advocate and trusted advisor for our members and see any issue through to resolution. We coach our team on the importance of focusing on the call you are on, and not the calls in the queue, regardless of how long the call might take. We support their advocacy services, even when it means multiple extended phone calls as it will ultimately result in a positive member experience, a CSR who is empowered and values the role they play for our organization, and a resolved call.

Coaching:

In addition to daily coaching support and call handling feedback, every CSR receives a monthly one-on-one coaching session with their team lead coach. We have made a commitment to the growth and development of our CSRs. Their coaching sessions are never cancelled due to call volumes and staffing. This commitment relays a clear message to our team that their growth, development and success are important to us, they are important to us. This approach not only strengthens our team by improving knowledge and confidence, but also has a positive impact on team morale as well.

Our commitment to the member experience is engrained in our culture, and all call center rewards and recognition tie back to this commitment to send a consistent and clear message. Ensuring a positive customer experience and seeing our member's issues through to resolution is priority number one.

Sebastian D'Agosta

CONNECTING THE DOTS

Prime Therapeutics

A member called in October and wanted to know why the cost for his 30-day supply of medication went up to \$265 when he had been paying a flat \$15 Tier II copay before. I advised him that his drug phase went into the gap since his last refill. That caused him to incur a 58% copay for the generic brand he was filling. The contracted rate of this medication was \$458 per month, so his current copay was now \$265. I advised the member of alternatives and he stated the doctor only wanted him on this medication. He had tried other medications and they had adverse effects on the member and as a result, caused him to go to the emergency room.

The member was sobbing and stated he was on a fixed income and just won't take the medication because he could no longer afford it. I could hear his wife in the background and she wanted to talk to me. I advised her of the situation and she too sounded distraught that her husband could not get the medication he needed. I informed them of the LICS program, because if approved, the worst-case scenario would be a 15% copay. She stated they didn't qualify when they had previously applied. It was heartbreaking to listen to this couple struggle to simply get the medicine they need.

I had one more option to look into and checked our Benefit Edit Tool to see if they had gap coverage. He DID have gap coverage, but it

only applied to Tier I medications and this was a Tier II medication. I informed the member that I would submit a Tier exception request to see if we could get it approved as a

"We will run through brick walls and fire to get the member the medication they need to feel better and live well."

Tier I so that he would just have a lower flat copay of \$2 per month, if approved. I informed the member I would personally track the progress of the request as often as I could so that I could update him as soon as we had a result. The member was crying and thanked me so much and said he would look forward to hearing from me.

After submitting the expedited request to our Clinical Review department, I sent them an email explaining the situation and asked if they could add extra priority to the request. I checked the progress every hour for the member and it was approved that afternoon. I called the local Pharmacy and had them rerun the refill and it went through as a \$2 dollar copay instead of \$265 for the 30-day supply.

When I called the member back to tell him it was approved as a Tier I medication, he was sobbing again, but this time it was out of joy that he could afford to get his medication. I informed the member that he would pay a total of \$6 for the rest of the year instead of \$795. For 2017, his cost for this med would be \$2 per month instead of \$15 and would carry over through the gap coverage again if it remains a Tier 1. The member was extremely emotional and kept thanking me. I told him it was my extreme pleasure and my voice was cracking at the end of the call.

After the call was over, I had to log off and go for a short stroll because I too had tears of joy and was so grateful that I could get this member his medication. There are those times when we get like that after calls because we care so much for these members. And we are so glad that we are given everything we need to assist these members to protect their health and get them what they need.

Our motto is "To get the member the medication they need to feel better and live well". All of us at Prime read that as "We will run through brick walls and fire to get the member the medication they need to feel better and live well." In every training group I assist with, I always inform them to check the BET for this process to see if it is available when the member goes into the gap.

Mark Gobardhan

MAINTAINING CONFIDENCE

Scotia iTRADE

One of the best aspects of being a customer service representative at Scotia iTRADE is that I can interact with a wide array of different clients every day. The calls that I receive can range from simple cash transfers to much more complex scenarios. As such, since each call received is different, I am able to adapt myself to each scenario which provides a learning opportunity for personal growth and development. One of the goals that I always have is being able to resolve a client's inquiry in the first call.

On day, I received a call from a very frustrated client at Scotia iTRADE. When I inquired on the issue that he was facing, he said that he was trying to fund his account and place a trade online but was unsuccessful in doing so. The client was informed that his account was fully approved and everything was set to go to. However, when he tried to access the app to begin his trading activities, he was still unable to proceed. This triggered him to make a second phone call to the call center within the same day. However, his interaction with the representative was abruptly disconnected. In turn, this made him distraught and he began to question on whether he still needed the account. As such, the client told me that he wanted to transfer his accounts to another institution and inquired on the procedure for doing this. Hearing this, I applied a concept that was introduced during my team meetings and it is known as the Client Experience Model (CEM). This entails the notion of actively listening to a client's request at hand and finding the best possible solutions.

I informed the client that I would definitely assist him with the problem and ensure that his trade is placed. I assured the client that if the call was disconnected, I would call him back immediately so that he does not have to repeat himself to another representative. The first thing I asked was whether the account was visible on the app. He said yes, but was unable to tap and interact with it. From that I knew immediately that the client was using the Scotiabank app, which is used for branch accounts, instead of the Scotia iTRADE app, which is used for trading accounts. I proceeded to walk the client through his mobile device to download the

appropriate app. However, when the client entered his card number and password to sign on, he was unable to proceed to the screen that would allow him to begin trading. He once again became disgruntled but I was not ready to give up since I wanted to stick to my goal of always resolving the problem. After placing the client on a brief hold and analyzing his account on the internal system, I discovered the issue. He was a new client and did not complete the 'Terms of Access'. I explained to the client on what he needed to do and I walked him through step by step of this setup. Once it was completed, the app was launched again and suddenly there was a burst of excitement. The client could fund his account and place an order for a stock he wanted! The tone of his voice went from someone being discouraged and wanting to move to another institution to someone who was ready and willing to begin using our platforms for future trades.

After listening to the client's comments, this provided me with a sense of accomplishment since I was able to turn his experience from being discontented to extremely satisfied. The client explained to me that he is new to trading since his son would always assist him in placing orders on his behalf. However, the son had to relocate to a different country for a job opportunity and he was left on his own. He also apologized for the way he interacted with me when I received his call. By hearing this, it allowed me to empathize and understand his feelings even more. Before the call ended, I guided him through the educational section of our homepage since he was a new client. The client was grateful for this information since his goal was to become a more savvy and active investor. He also wanted me to transfer him to my manager. A detailed voice message was left on my manager's phone and it was shared during my next team meeting. This was very momentous and meaningful since I had recently joined the company a few months prior.

Whenever a new customer service representative job shadows with me, I use this particular call as an example and I provide them with advice and information on how to deal with complex scenarios and a hostile client.

Madison Blow

A COMMON MISCONCEPTION

BlueCross BlueShield of Vermont

As a customer service representative, I take pride in providing excellent service to each customer I have the pleasure of speaking with. I see each call that I take as an opportunity to make someone's day brighter by easing any concerns they may have and using all available resources to make sure their call is resolved. There is a common misconception held by the public that individuals who work in a call center must not enjoy what they do or care what kind of service they provide because of a prior experience. This is not the case with the BlueCross BlueShield of Vermont call center. We have customers that express joy to be speaking with our representatives because of how helpful, understanding, and kind they are. I will always remember this one call where I had the chance to go above and beyond for one of our customers and truly make a difference for him.

One morning in the summer of 2016, I received a phone call from a kind, older gentleman, who sounded a little shy and embarrassed to be speaking to someone. He went on to explain that he had lost one of his eyes many years ago, and that he used to have a prosthetic eyeball, however, he had misplaced his only prosthetic eye a few years back. Since then, he had been using an unspecified ball that had not been fit for that purpose and was finally starting to cause irritation, not to mention, was very uncomfortable

for him. He said that he had been holding off on getting a new one because he did not know of anyone who could make a prosthetic eye. I immediately assured him that he was speaking to the right person and I would do everything in my power to find a prosthetic eye supplier, so that he could finally have the safe and comfortable prosthetic that he deserved. I explained that I would make his situation a priority for me and would complete all necessary research and would call him back by the end of the day.

I had never handled such a unique situation, so I needed some assistance on where to start. I started by asking our extremely knowledgeable member ombudsman, if she knew of any prosthetic suppliers who would be able to make eyes. She stated that she did not know of anyone, but that I should start by calling around to some different durable medical equipment suppliers and prosthetic suppliers. I used the BCBSVT Find a Doctor Tool to locate in-network suppliers in his area and found 5 different providers that fit the criteria. I called all 5 suppliers on the list to see if any of them made prosthetic eyes or if they had any leads on other places. Unfortunately, none of the suppliers made what the member needed and they did not have any leads on where I could look next.

I was determined to not give up and I decided to call our Integrated Health department's concierge line to see if they knew of any options. The representative in IH spoke with her colleagues and stated that they only knew of one man who supplied prosthetic eyes but he was in New Hampshire, which was an out-of-network provider who they had not heard from in some time, so she was not positive if he was still in business. I explained this member's situation to the IH representative and asked them if he would be able to obtain an out-of-network prior approval due to the services not being available in-network. Fortunately, she stated that since services are unavailable in-network, the member had a great case for getting an out-of-network prior approval to see this provider.

Based on the provider's location in New Hampshire, I could call him directly. I dialed the phone number IH had on file right away. Thankfully, he picked up the phone and I was able to ask him if he still produced prosthetic eyes. He advised that he did still make prosthetic eyes and that he had some openings. Since I knew that his location was a little bit further from the member than was preferred, I asked the provider if he had any other locations that he worked from. To my delight, he stated that he traveled to the University of Vermont Medical Center in Burlington, VT about once

a month. He explained that they may have some openings there, but that UVMHC oversaw that schedule. After I got off the phone with the provider, I called UVMHC to see if they had any openings for upcoming appointments and they said that they did have a few openings for the next time the provider would be there.

After three or more hours of researching, outreaching to providers, and working with a few different people interdepartmentally within BCBSVT, I was finally able to call the member back and give him the good news! When I reached him, he was excited to learn that there was a provider available and although he was out of network, that he would be able to submit a prior approval to see him at the in-network level of benefits. I also advised that he would be able to see the provider at the UVMHC campus in Burlington if he would like because they are closer. I shared with him their open appointment slots. We also thoroughly went over his benefits and his next steps so that he would be completely prepared by having all necessary and appropriate information. He was very grateful and excited that he would finally be able to get a

replacement eye that would fit him and would be safe and comfortable for him to use.

This member was coping with an inadequate eye replacement because he did not know where to go, if it was covered, and felt

our callers, regardless of the time spent on each case. I am especially proud that I was able to own the research and resolution of this case and advocate for our member in an effort to reduce his concern, stress, make his life a little easier and bring him some comfort knowing he could now have the prosthetic he deserved.

I was especially grateful that I was able to work for a company that values “quality over quantity.”

overwhelmed with how to go about maneuvering the system. That day, I was especially grateful that I was able to work for a company that values “quality over quantity.” A company that would not only allow me to take so much time out of day to research for one case, but encourages me to go the extra mile for every one of



Michelle Dobson

NEGATIVE INTO POSITIVE

BlueCross BlueShield of South Carolina

Michelle has worked extremely hard to become a World Class Advocate over the past several years and is now a first-time World Class Advocate. She has embraced coaching and looks for ways on each call to resolve the issue and make the experience memorable. The following is an example of how Michelle can take a negative call and turn it into a positive experience for the member.

Michelle turned this negative experience into a positive. After having the member hang up on her, Michelle had two options. One, take the next call, or two, take accountability and get the issue resolved. A World Class Advocate takes the second option, which is what Michelle does each and every time she receives a call.

**Michelle had two options.
One, take the next call, or two, take
accountability and get the issue resolved.**

Michelle received a call from a member that was not showing as having any coverage. Since coverage was not active, the member was highly upset. The member was receiving treatment and said the provider refused to see her that day. The member said if she did not receive the treatment there was a possibility she could die. After research, it was determined that the member did indeed no longer have coverage, but COBRA coverage was offered and the entire COBRA premium had not been paid in full. The member became highly upset and hung up on Michelle.

Michelle did not let the issue end; she took the issue as her own. She immediately called the member back and acknowledged the member's emotions and explained the issue and how to resolve it. She connected the member to the COBRA vendor to get the payment updated. Later that day, Michelle contacted the COBRA vendor to get the eligibility updated. She then called the member back as well as the provider, and let them know everything was updated. Michelle made sure the member had her treatment service back in place to ensure the member suffered no additional medical effects.

After the issue was resolved, the member called a member of management and said the following about her experience:

"I received the best service from Michelle. When I hung up, I did not know what to do, but Michelle called me back and that really impressed me. Michelle was so willing to work to resolve my issues and I was impressed with all of her follow ups. I just wanted to call in and say thank you for having a customer advocate like Michelle who is patient, kind and will do whatever it takes to get the issue resolved."



Jason Chapman

PUT THE MEMBER FIRST NO MATTER WHAT

Regence BlueCross BlueShield

I believe customer service can make or break a company. At Regence Medicare Advantage, we pride ourselves on our customer service. We put the member first no matter what. That's what I love about my job as a customer service representative at Regence. When the company says it cares about the member, they mean it. My favorite calls are when members tell me they will never leave Regence because they love our customer service. When I hear that, I know I am doing a good job, as is our customer service department as a whole.

Sometimes members and their families need an experienced advocate to help resolve a difficult issue. That was the case when I answered the phone that day and heard our member's son talk about the nightmare he and his mother were going through. I listened as he explained that he was receiving collection notices from several companies for his parents' health care bills. He'd made numerous calls, but wasn't getting anywhere, so he turned to Regence for help.

His ordeal was heart-wrenching. Both his parents had been involved in a serious car accident. His father passed away in the hospital the day of the accident, and his mother had been hospitalized for more than a month. Following the accident, she underwent several surgeries and had multiple follow-up visits with doctors. The care his mother and father received resulted in several claims, some very large and many smaller ones. This already difficult situation was made even more difficult because multiple insurance companies were attempting to coordinate payment.

Providers wouldn't talk to the son because he wasn't the patient. To make it more difficult, his mother was just getting her life back together, and he dreaded telling her about the collections notices and bringing up the accident. I listened while he explained all he had been trying to work through. He couldn't understand why two insurance companies couldn't work together to pay his parents' claims. He felt caught in the middle and didn't know what

to do. When I heard about the family's dilemma, I knew I had to step in and help resolve the issue quickly.

I expressed to him my deepest sympathy for the loss of his father and his mother's condition. I acknowledged that things can get complicated when working with multiple insurance companies, and even more complicated when services are rendered outside the service area. I told him to focus on his mother's recovery and to let Regence and I deal with the billing and claims issues.

When I ended the call with him, I went right to work. My goal was to remove any and all barriers and allow his family to move on from the accident.

I called our Other Party Liability (OPL) and Claims departments. I contacted multiple providers, spending hours on the phone. It took several follow-up calls to providers and internal departments to get things sorted out. This was a complex issue and required a lot of patience. I kept in touch with the member along the way so he knew where things stood. In the end, he and I created a relationship built on trust. He knew he could call me with new questions or issues. It gave me such pride to help him during this difficult time and get everything handled for his parents.

Shortly after our last conversation, he sent a letter to Regence. "Truly, Jason is what makes companies like Regence perform and resonate with their customers, and I am extremely pleased that my parents chose to work with your company for their Medicare Advantage plan," he wrote. "I can't even imagine what I'd be going through if I was working with Medicare directly."

Our members and their families are like my own family, and I always give 100 percent on every call. That means making sure members get the answer and resolution to the issue no matter what it takes. Even if it takes more than a dozen phone calls, I will do it! That's why I enjoy being a part of our Customer Service team.

ENTERTAINMENT



THE YOUNG'UNS

Tuesday, May 2nd

The Okanagan's most versatile cover band. Voted "Best of the Okanagan" 2014, The YOUNG'UNS have been a staple of the area for many years. The Okanagan's most versatile band is better than ever this year with many new songs and mash-ups that will keep you going all set long. Formed in 1989, the YOUNG'UNS are a group of veteran musicians that have worked the valley for many years. Check them out at www.theyounguns.com



COD GONE WILD

Wednesday, May 3rd

What do you get when you combine a tenderhearted singer songwriter from Newfoundland, a larger than life Albertan drummer raised in Saudi Arabia, an internationally renowned fiddling BC beauty, and an effortlessly cool Japanese Canadian bass player? None other than Cod Gone Wild.



THE LEGENDARY LAKE MONSTERS

Thursday, May 4th

Ten guys, one girl, six horns, a Hammond B-3, one guitar, bass, drums, and harmonies from heaven. Think Gloria Estefan meets Amy Winehouse walking into a club to jam with the Tower of Power boys, Carlos is playing guitar with Prince, all this is happening in Chicago in a time warp. That's the Legendary Lake Monsters from Vernon, British Columbia.

This year SQM has assembled a great group of exhibitors who will assist you in improving your CX and FCR. We invite you to visit them on Tuesday and Wednesday when they will have booths in the Fireside Lounge. These great industry contributors were recommended by our client base or are companies who SQM has worked with.

The logo for Ulysses Learning, featuring the word "Ulysses" in a grey serif font and "Learning" in a red sans-serif font, with a faint background graphic of a person's legs in motion.

Ulysses Learning has helped the most prominent organizations in the United States and abroad to improve their customer service, sales and coaching results. They work with the energy, telecom, insurance, manufacturing, hospitality and financial services industries as well as many others.

The logo for Millennium 1 Solutions, featuring a stylized "M1" in blue and green, followed by the text "MILLENNIUM 1 SOLUTIONS" in a black sans-serif font.

Millennium1 Solutions is a leading Canadian Business Process Outsourcer who is proud to have been recognized with multiple SQM best practice and performance awards in recent years. M1S is a trusted contact centre solutions provider to dozens of North America's most well-known brands and is one of the fastest growing BPO organizations in Canada.

The logo for Nuance, featuring a stylized black icon of a person's head and shoulders, followed by the word "NUANCE" in a bold, black sans-serif font.

Nuance will share how they are reinventing the relationship between enterprises & consumers through intelligent customer engagement solutions powered by Artificial Intelligence.

The logo for Fonolo, featuring the word "fonolo" in a blue, rounded, sans-serif font with a white outline.

As the leading provider of cloud-based call-back solutions, Fonolo improves the call center experience by eliminating hold-time and providing sophisticated contact capabilities for online and mobile customers.



Get to know Millennium1 Solutions Today!

Millennium1 Solutions is a leading Canadian Business Process Outsourcer proud to have been recognized with multiple SQM awards in recent years. We are a trusted Contact Centre solutions provider to dozens of North America's most recognizable brands.

Our customers value our partnership for our industry recognized customer experience delivery and strategic insight on business improvement opportunities. We have nearly 2000 employees across our 5 locations and enjoy celebrating our "Customer Heroes" each day.

Talk to us at the SQM conference to learn more about our recipe for success - including our award-winning approach to Quality Assurance. Find out more today!



Visit our booth at the SQM conference!

web: www.millennium1solutions.com e-mail: info@millennium1solutions.com



Customer self-service intelligently delivered.

Want to learn how to change ordinary customer service into **extraordinary** customer experiences?

Stop by the Nuance booth during the reception or break exhibitor sessions to hear how companies today are partnering with Nuance to create intelligent, advanced customer service solutions that customers love to use.



www.nuance.com/for-business/customer-service-solutions





Losing Customers to Hold Time?

CALL-BACK SOLUTIONS FOR THE CALL CENTER

- Reduce abandon rates
- Smooth out volume spikes
- Lower cost-per-call
- Improve the experience
- Cloud-based or on-premise
- Works with any platform



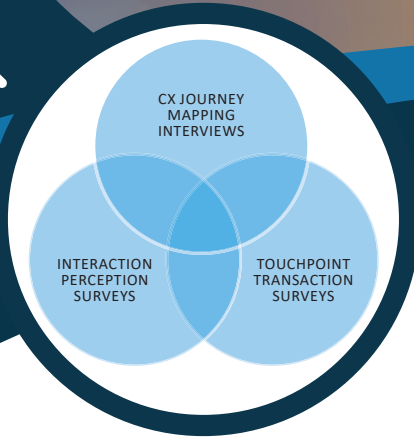
Learn more at **fonolo.com** or call **1.855.366.2500**



Ulysses Learning redefines the way customers are cared for and transforms customer service, sales and coaching conversations through a unique learning approach.

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www.ulysseslearning.com to get started.

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CX LISTENING POSTS

SQM's CX journey mapping process uses three overlapping listening posts to have a comprehensive understanding of CX.

POWERFUL BENEFITS OF CX JOURNEY MAPPING:

Holistic approach – the main advantage of CX journey mapping is its focus on the customer's entire journey (e.g., brand awareness through to renewing) when using an organization's products and/or services.

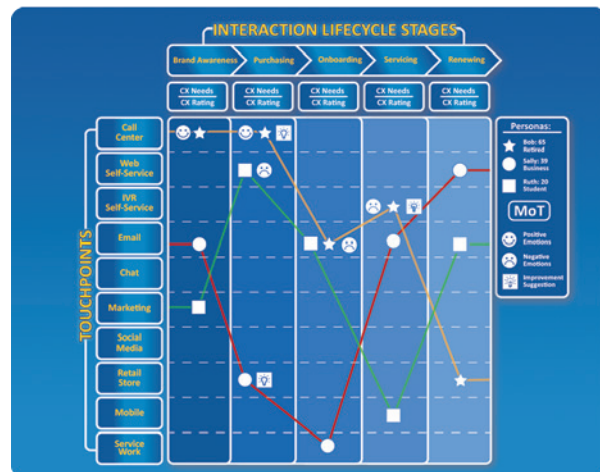
Understand CX better – the essence of the CX journey mapping process is that it allows you to walk in the customer's shoes as they interact with your organization through their lifecycle stages.

Discover CX improvement opportunities – an effective CX journey map provides insights on customer expectations at every significant interaction using a touchpoint and how well the organization is doing at meeting those expectations.

Foundation for developing an action plan – the CX journey map insights are the foundation for developing an action plan.

CX JOURNEY MAPPING

The CX journey map is created based on a skilled interviewer asking a customer about their interaction lifecycle stages and touchpoint MoT experiences when they used the organization's products and/or services.



TO LEARN MORE ABOUT SQM'S CX JOURNEY MAPPING SERVICE

INFORM@SQMGROUP.COM 1-800-446-2095 WWW.SQMGROUP.COM

CSR APPRECIATION DAY ACTIVITIES



'KurSpa' comes from the German word kur (which means 'healing') and spa (Latin for 'water') to mean 'health by water', which epitomizes the philosophy behind Sparkling Hill's luxury wellness spa. KurSpa is the largest among luxury spas in Canada and considered by many to be the most unique in the world. Comprised of over 40,000 sq. ft. of treatment space infused with unique Swarovski crystal architecture, and offering 100+ innovative healing treatments, KurSpa provides guests with the wellness retreat of a lifetime.



Join Executive Chef Romaine as he teaches you how to prepare an exquisite 3 course meal, as well as a local sommelier who will teach you how to pair the perfect wine with the meal. This is a hands-on experience. Enjoy the fruits of your labors at the end of the class as you enjoy your chef inspired perfect lunch.



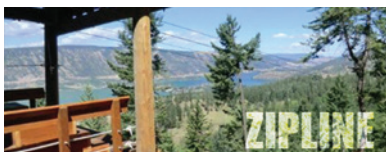
Predator Ridge Resort offers the Okanagan's best golf experience, rich in history and tradition, Predator Ridge is set amongst one of the most scenic backdrops in North America. Their courses offer distinctly challenging yet playable layouts for golfers of all levels.



The North Okanagan has many wineries to peak your curiosity and desire to discover a way of life that includes the growing and making of wine. Join us as we venture into the beautiful wineries nestled in the scenic hillsides of the North Okanagan. These wineries produce some of the Okanagan Valley's very best fresh, crisp, aromatic white and light red wines. This tour includes a stop at the oldest family owned and operated winery in BC, Gray Monk Estate Winery. A total of 5 wineries in the Lake Country will be visited during the tour.



Love hiking or walking in the great outdoors? Love yoga? Wake up to a one hour session of morning yoga in the world renowned Sparkling Hill spa. After the yoga session, Sparkling Hill's own kinesiologist will provide a guided tour through some of the Okanagan Lake mountains so you can enjoy the breathtaking views of the valley. A picnic lunch will be served during the hike.



Experience the thrill of ziplining. Oyama Zipline Adventure Park is the Top Zipline & Aerial Park in the Okanagan Valley. Join us for a 2.5 hour ziplining tour over 70 forested acres (more than 7000' of zip lines). Lots of diversity including side-by-side racing lines, rope bridges, half-pipe slack lines, 1500' long lines and trap-door starts. 7 stations one-after-the-other with speeds clocked as fast as 85 km/hr!

TOP 5 REASONS TO PURCHASE ONE CONTACT RESOLUTION 2ND EDITION

SQM'S NEW BOOK SHARES RESEARCH AND BEST PRACTICES FOR IMPROVING CONTACT CHANNEL CUSTOMER EXPERIENCE BASED ON AWARD WINNING CONTACT CENTERS.

- 1.** This book was written by Mike Desmarais, CEO and Founder of SQM, and Lara Pow, President of SQM, who are industry thought leaders for customer experience measurement.
- 2.** Understand how to measure and improve One Contact Resolution – The Metric that Matters the Most for Improving Multi-Channel Customer Experience.
- 3.** Learn about ground-breaking customer research on contact channel (e.g., call center, email, chat, web self-service and IVR self-service) customer experiences for resolving an inquiry or problem.
- 4.** Discover how to provide an omni-channel customer experience that is a seamless experience for customers who use two or more contact channels to resolve the same inquiry or problem.
- 5.** This book provides 16 best practice case studies from award winning organizations including Canadian Tire, American Express, FedEx, VSP Vision Care, Blue Cross Blue Shield and UPMC Health Plan



GET YOUR COPY OF ONE CONTACT RESOLUTION

INFORM@SQMGROUP.COM 1-800-446-2095 WWW.SQMGROUP.COM