



19th ANNUAL CUSTOMER EXPERIENCE CONFERENCE AND INDUSTRY AWARDS

EVENT GUIDE



SPARKLING HILL RESORT
VERNON, B.C.
MAY 22 - 24, 2018





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LETTER FROM SQM'S PRESIDENT

Dear SQM Guest,

Thank you for joining us at SQM's 19th Annual Customer Experience Research Conference and Industry Awards at the spectacular Sparkling Hill Resort in Vernon, B.C., May 22 – 24, 2018. Since 1996, SQM has brought together hundreds of contact center, customer experience (CX), CRM, and market research leaders for our annual CX best practice and CX excellence conference and awards gala. 85% of past attendees rated this conference as world-class. SQM's 2018 conference will focus on CX research and best practices.



SQM is pleased to announce our 2017 award-winning organizations and frontline employees. SQM's CX Industry Awards are the most prestigious and sought-after North American contact center industry awards. Each year, we recognize organizations that have demonstrated excellence in maintaining or improving customer and employee experience performance. At this year's CX awards ceremony, SQM will present and recognize the top performing organizations for achieving world class FCR, Csat, employee experience (EX), and CX Best Practice performance, with over 60 different awards including Contact Center of the Year, FCR Improvement, World Class CX Certification, Highest CX, Highest EX, CX Leaders, and CX Best Practice Awards.

We will also recognize the Top 25 CSR of the Year Finalists who are the "best-of-the-best" World Class CX Certified CSRs, and of those 25 CSRs, we will announce one as the 2017 CSR of the Year. The CSR of the Year will receive a World Class CX medallion, pin tube award, a trophy to display on their desk, and \$1,000 in cash at the awards ceremony. In addition, we will recognize the Top 6 Supervisors of the Year who are the "best-of-the-best" World Class CX Certified Supervisors, and of those 6 Supervisors, we will announce one as the 2017 Supervisor of the Year. The Supervisor of the Year will be given a World Class CX medallion, a trophy to display on their desk, and \$1,000 in cash at the awards ceremony. We believe that supervisors are a key ingredient to creating World Class CX performance. SQM will also recognize the Top CSR and Supervisor World Class CX Improvement winners for their outstanding success as well.

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

Sincerely,

A handwritten signature in black ink that reads "Lara Pow". The signature is fluid and cursive, with the first name "Lara" and last name "Pow" clearly distinguishable.

Dr. Lara Pow
President, SQM Group



AGENDA OVERVIEW



Agenda Overview		
Tuesday, May 22 – Day 1 Customer Experience Best Practices		
Time	Location	Details
11:00 am – 2:00 pm	PeakFine Restaurant	Lunch Buffet Appreciate the finest and freshest ingredients the Okanagan Valley has to offer while taking in the stunning lake and mountain views from the sparkling dining room.
12:00 pm – 6:00 pm	Sparkling Hill Lobby	Registration SQM cordially welcomes guests to the beautiful Sparkling Hill Resort. Conference attendees can pick up registration packages, coordinate activities, and sign up for tours.
Tour Times: 10:00 am – 12:00 pm 1:00 pm – 3:00 pm 3:00 pm – 5:00 pm	SQM's VoC Research Centre	SQM VoC Research Centre Tour Come see SQM's state-of-the-art VoC Research Centre facility, which opened in February of 2017. Staggered groups to be taken on buses throughout the afternoon. Please sign up when you register for the conference or at the registration desk when you arrive.
4:00 pm – 6:00 pm	Fireside Lounge	mySQM™ CX Insights Demonstration The release of the new mySQM™ CX Insights, SQM's online reporting tool, is just around the corner. Beta users are working to perfect the software so that your transition will be seamless. Come experience the new mySQM™ .
4:00 pm – 6:00 pm	Fireside Lounge	Networking Drop by the Fireside Lounge to network with fellow attendees while enjoying appetizers and wines from the many wineries in the Okanagan Valley, known as the "Napa Valley of the North".
4:00 pm – 10:00 pm	KurSpa	Relaxation Enjoy the saunas, steam rooms, and pools at KurSpa, the largest among luxury spas in Canada and considered by many to be the most unique in the world.
6:00 pm – 9:00 pm	Austria Ballroom / Fireside Lounge	Fire & Ice Themed Dinner Enjoy a Fire & Ice themed night with local beer, wine, and food. Come dressed up as fire (red or orange) or ice (blue or white).



AGENDA OVERVIEW

Wednesday, May 23 – Day 2 Customer Experience Research & Best Practices		
7:00 am – 8:30 am	Breakfast Buffet – PeakFine Restaurant	
8:30 am – 9:30 am	Customer Experience Research Keynote Speaker: Mike Desmarais, Founder and CEO, SQM Austria Ballroom – Available to Executive and Management track registrants Mike Desmarais, Founder and CEO of SQM, will share highlights from SQM's 2018 customer loyalty by industry and customer experience improvement opportunities research. Mike will also share the Top 5 CSR best practices for providing great CX and improving CX.	
9:30 am – 10:00 am	Measuring & Benchmarking Internal First Contact Resolution Keynote Speaker: Lara Pow, President, SQM Austria Ballroom – Available to Executive and Management track registrants The most important metric for improving the customer experience using contact channels is FCR. Lara Pow will introduce best practices for measuring internal FCR and describe how to use it in conjunction with VoC FCR. Internal FCR calculates and measures the percentage of contact list records where there is not a repeat contact within a specified time-frame.	
10:00 am – 10:30 am	Coffee Break – Fireside Lounge Enjoy coffee and treats	
	Executive Track By invitation only Library Mike Desmarais, Founder and CEO of SQM, will share CX research and best practices. In addition, world class leaders will share best practices for improving CX using contact channels.	Management Track Austria Ballroom 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 performance.
10:30 am – 11:15 am	Career Development Kirsten Hinton, VSP Vision Care	Emerging Channels Best Practices Matt Tomlinson, EA Worldwide Customer Experience
11:15 am – 12:00 pm	CSR Recognition Program Natia Alfieri & Julie Lamarre, Cogeco Connexion	Continuous Improvement Process Ken Baur & Alex Lang, Security Health Plan
12:00 pm – 1:00 pm	Lunch Buffet – PeakFine Restaurant	
1:00 pm – 1:45 pm	Emerging Channels Best Practices Matt Tomlinson, EA Worldwide Customer Experience	Omni-Channel Best Practices Lisa Moody, World Vision Canada
1:45 pm – 2:30 pm	Continuous Improvement Process Ken Baur & Alex Lang, Security Health Plan	Career Development Kirsten Hinton, VSP Vision Care
2:30 pm – 3:00 pm	Break	
3:00 pm – 3:45 pm	Omni-Channel Best Practices Lisa Moody, World Vision Canada	CSR Recognition Program Natia Alfieri & Julie Lamarre, Cogeco Connexion
4:00 pm – 10:00 pm	Relaxation Enjoy the saunas, steam rooms, and pools at KurSpa, the largest among luxury spas in Canada and considered by many to be the most unique in the world.	
6:00 pm – 10:00 pm	Western Themed Dinner – Austria Ballroom Join us for a Western themed barbeque, sampling a variety of culinary creations with local beer, cider, and wine. Entertainment by the Young'uns, voted Okanagan Valley's best local music group. Bring your cowboy boots and gear, and be ready for a great time!	



AGENDA OVERVIEW

Thursday, May 24 – Day 3 Customer Experience Best Practices				
Time	Executive Track Library	Management Track Austria Ballroom	CSR Appreciation Day	
7:00 am – 9:15 am	Breakfast Buffet – PeakFine Restaurant		Breakfast Buffet – Meritage Room A & B @ Four Points by Sheraton	
9:15 am – 10:00 am	CSR Training Program Emma Dellalian, Canadian Tire Financial Services	CSR Selection Process Jennifer Carbone, Blue Cross Blue Shield of Massachusetts	CSR Appreciation Day Activities <ul style="list-style-type: none">• KurSpa treatments• Golf at Predator Ridge• Zipline Adventure• Kelowna East Bench Winery Tour• Kayaks & Spirits• Okanagan Lake Houseboat Cruise• Pinot & Picasso	
10:00 am – 10:30 am	Break	Break		
10:30 am – 11:15 am	Quality Assurance Program Penny Garrett & Jackie Heaven-Ah Hi, Regence Blue Cross and Blue Shield Plans	Quality Assurance Program Janalee Willett, BlueCross BlueShield of Vermont		
11:15 am – 12:00 pm	CSR Selection Process Jennifer Carbone, Blue Cross Blue Shield of Massachusetts	CSR Training Program Emma Dellalian, Canadian Tire Financial Services		
12:00 pm – 1:00 pm	Lunch Buffet – PeakFine Restaurant			
1:00 pm – 2:00 pm	Contact Center of the Year for 2017 – VSP Vision Care Keynote Speaker: Kathy Rodine, Vice President, Customer Care Austria Ballroom – Executive and Management track registrants Learn how VSP Vision Care achieved world class FCR and employee satisfaction and, as a result, became Contact Center of the Year.			
2:00 pm – 3:00 pm	TCPA Compliance Keynote Speaker: Christine Reilly, JD, Partner, Manatt, Phelps & Phillips, LLP Austria Ballroom – Executive and Management track registrants A presentation describing how TCPA compliance and the recent decisions of the D.C. Circuit affects organizations when outbound dialing			
3:00 pm – 5:00 pm	Rest and Relaxation Time			
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 19th Annual Most Prestigious North American Customer Experience Awards Program for Service Quality Excellence – as judged by customers who used a contact channel and by employees who work in a contact center. SQM will be presenting Service Quality Excellence Awards and Certificates. Casino Royale Double down and let the roulette wheel spin. Celebrate into the night with a jackpot experience featuring Texas hold ‘em, Blackjack, Roulette, Casino Wheels and more! DJ Cherry OnTop will be spinning tunes in the Fireside Lounge until midnight or go see John Noren playing live music in Barrique & Java.		



19TH ANNUAL CUSTOMER EXPERIENCE 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 over 1.5 million surveys with customers who have used a call center, email, website, IVR, or retail site contact

Criteria used for Contact Center World Class CX Certification are 80% or higher of the calls are at the world class level for 3 consecutive months or more in 2017. SQM's world class call criteria are based on the customer's call being resolved on the first call to the contact center.

SQM is pleased to announce our 2017 award-winning contact centers and frontline employees. This is SQM's 19th 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 voice of the customer survey ratings. We have recognized top performing organizations for CX since 1998. SQM has more than 60 different awards that recognize the top performing organizations.

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 both rating questions and follow-up customer feedback questions that can be used to help the organization improve their contact channels' customer experience. SQM conducted the benchmarking studies during the period of January 1, 2017 to December 31, 2017.

Criteria used for Contact Center of the Year are based on having the highest combined CX and employee experience (EX) ratings. This is the same criteria for Best Performing Small- to Mid-Sized Contact Center (under 100 CSRs).

SQM recognizes contact centers that have demonstrated CX Best Practices for 17 different categories including: Omni-Channel, Web Self-Service Channel, Emerging Channels, and other CX Best Practices specific to the contact center. These awards recognize organizations that have demonstrated they have improved or helped maintain high CX performance because of their best practice. CX Best Practice stories were submitted by clients and non-clients through an online application form and were judged by a panel of six subject matter experts to determine the 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 in providing CX greatness!



AWARD WINNERS & FINALISTS LISTING

CONTACT CENTER OF THE YEAR AWARD

	Organization:	Criteria:
Winner:	VSP Vision Care	Criteria used for Contact Center of the Year is based on having the highest combined customer experience (CX) and employee experience (EX) ratings. CX measurement is based on the FCR metric and EX measurement is based on the employee satisfaction (top box) rating.
Finalists:	Canadian Tire Financial Services (CRCC)	
	Jackson	

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 (between 25 to 99 CSRs) is based on having the highest combined customer experience (CX) and employee experience (EX) ratings. CX measurement is based on the FCR metric and EX measurement is based on employee satisfaction (top box) rating.
Finalists:	Security Health Plan	
	TELUS Employer Solutions Inc.	

CONTACT CENTER WORLD CLASS CX CERTIFICATION

407 ETR (Contact Centre/Commercial)	Genworth Life Customer Service
Altair	Genworth Long Term Care Customer Service
Blue Cross and Blue Shield of Kansas	Jackson
Blue Cross Blue Shield of Massachusetts (Retail Sales and Retention)	Marchon Eyewear Inc.
BlueCross BlueShield of Vermont	Millennium1 Solutions (Credit Card Sales Segment)
Canadian Red Cross	Security Health Plan
Canadian Tire Financial Services (CRCC)	Sun Life Financial Group Retirement Services (Waterloo)
Enbridge Large Business Accounts	VSP Vision Care (California)
Florida Blue (Federal Employee Program)	VSP Vision Care (Ohio)
FortisBC	World Vision Canada

Criteria: Criteria used for Contact Center World Class CX Certification is based on 80% (or higher) of customers getting their call resolved on the first call (FCR) for 3 consecutive months or more.



AWARD WINNERS & FINALISTS LISTING

WEB SELF-SERVICE WORLD CLASS CX CERTIFICATION

Organization:	Criteria:
FortisBC	Criteria used for Web Self-Service World Class CX Certification is based on 80% (or higher) of customers getting their contact resolved on the first contact with the website (FCR) for 3 consecutive months or more.

CUSTOMER EXPERIENCE BEST PRACTICE AWARD WINNERS

Category:	Organization:
Omni-Channel	World Vision Canada
Web Self-Service	FortisBC
Emerging Channels	EA Worldwide Customer Experience
Quality Assurance Program	BlueCross BlueShield of Vermont
Desktop Applications	Regence Blue Cross and Blue Shield Plans (Idaho, Oregon, Utah & select counties of Washington State)
CSR Recognition Program	Cogeco Connexion
Career Development	VSP Vision Care
Call Handling Practice	Marchon/Altair Eyewear
Escalation CSR Support	Regence Blue Cross and Blue Shield Plans (Idaho, Oregon, Utah & select counties of Washington State)
Performance Management System	BlueCross BlueShield of South Carolina
CSR Coaching Program	Mr. Cooper
CSR Training Program	Canadian Tire Financial Services
CSR Selection Process	Blue Cross Blue Shield of Massachusetts
Standard Operating Procedures	Genworth
Continuous Improvement Process	Security Health Plan
Criteria: These awards recognize the organization that has demonstrated they have improved or helped maintain high FCR and customer experience (CX) performance. Organizations submit specific practices they have used to improve or maintain high FCR and Csat performance.	

AWARD WINNERS & FINALISTS LISTING

CSR FINALISTS FOR CSR OF THE YEAR

Name:	Organization:	Criteria:
Kerri Jeffords	BlueCross BlueShield of North Carolina	To be eligible the customer service representative (CSR) must be World Class CX Certified. The criteria for a World Class CX Certified CSR is 85% or higher of the calls surveyed are at the World Class Call (WCC) level. SQM's WCC criteria is based on the customer's call being resolved and the customer is overall very satisfied (top box response) with the CSR who handled their call. Call center management must also send an example of a great customer service story that the CSR delivered.
Sandra Wilson	BlueCross BlueShield of North Carolina	
Crystal Brown	BlueCross BlueShield of South Carolina	
Kathy Bledsoe	BlueCross BlueShield of South Carolina	
Michelle Dobson	BlueCross BlueShield of South Carolina	
Alyssa Pratt	BlueCross BlueShield of Vermont	
Cerridwen Moser-Bertsche	BlueCross BlueShield of Vermont	
Jennie Stevens	BlueCross BlueShield of Vermont	
Graham Wiaz	Cogeco Connexion	
Jason Gould	Cogeco Connexion	
Wesley Clarke	Cogeco Connexion	
Courtney Abobo	Marchon/Altair Eyewear	
Juliana Klingel	Marchon/Altair Eyewear	
Fadumo Hassan	Millennium1 Solutions	
Shandra Roberts	Premera Blue Cross	
Shari Waibel	Premera Blue Cross	
Autum Hall	Regence Blue Cross and Blue Shield Plans (Idaho, Oregon, Utah & select counties of Washington State)	
Christopher Waid	Regence Blue Cross and Blue Shield Plans (Idaho, Oregon, Utah & select counties of Washington State)	
Haron Hofioni	Scotia iTRADE	
Rose-Berthe Beaubrun	Scotia iTRADE	
Dan Adair	Sun Life Financial	
Jeff Bowden	Sun Life Financial	
Kelsey MacDonald	Sun Life Financial	
Kim Rourke	Sun Life Financial	
Carlos Brathwaite	VSP Vision Care	



AWARD WINNERS & FINALISTS LISTING

SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

Name:	Organization:	Criteria:
Charleen Berryman	407 ETR	To be eligible the supervisor must be World Class CX Certified. The criteria for a World Class CX 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.
Alissa Debo	HealthNow New York Inc.	
Charlene Toth	Sun Life Financial	
Kendra Gillgrass	Sun Life Financial	
Sonia Lauzon	Sun Life Financial	
Derrick Huwer	VSP Vision Care	

CSR TOP WORLD CLASS CX IMPROVEMENT WINNERS

Name:	Organization:	Criteria:
Shauntell Kenion	BlueCross BlueShield of North Carolina	To be eligible the customer service representative (CSR) must have a 10% or greater annual world class CX metric improvement from the previous year. SQM's WCC criteria is based on the customer's call being resolved and the customer is overall very satisfied (top box response) rating with the CSR who handled their call. Call center management must also send an example of a great customer service story that the CSR delivered.
Sheryl Jefferys	BlueCross BlueShield of North Carolina	
Donna Poirier	Cogeco Connexion	
Brittany Wood-Taylor	VSP Vision Care	
Lindsay Argo	VSP Vision Care	

SUPERVISOR TOP WORLD CLASS CX IMPROVEMENT WINNER

Name:	Organization:	Criteria:
Alex Rambert	BlueCross BlueShield of North Carolina	To be eligible the supervisor must have a 10% or greater annual world class CX metric improvement from the previous year. CSRs must also send a CX improvement story on how the supervisor helped them improve their call resolution or Csat performance.





CUSTOMER EXPERIENCE AWARDS

First Call Resolution Improvement Awards

Organization:		Criteria:
407 ETR (Commercial)	Highmark Blue Cross Blue Shield Delaware (Federal Employee Program)	Based on a 5% or greater annual FCR improvement from the previous year.
BC Automobile Association (BCAA)	Highmark Blue Cross Blue Shield West Virginia (Federal Employee Program)	
Blue Cross Blue Shield of Arizona	Independence Blue Cross	
BlueCross BlueShield of North Carolina	LoyaltyOne	
Blue Cross Blue Shield of Wyoming (Federal Employee Program)	Mr. Cooper (Assurant)	
Canadian Red Cross	Mr. Cooper (Default)	
Capital BlueCross	Premiera Blue Cross	
CareFirst - Consumer Direct SBU	Regence BlueCross BlueShield Oregon (Federal Employee Program)	
Genworth Life Customer Service		



AWARD WINNERS & FINALISTS LISTING

CUSTOMER EXPERIENCE AWARDS

Highest Customer Service by Industry Awards

Category:	Organization:	Criteria:
Banking	Vancity	CX is based on the organization having the highest FCR rating in each specific industry/sector.
Financial	Jackson	
Credit Card	Canadian Tire Financial Services (CRCC)	
Insurance	VSP Vision Care	
Health Care	Security Health Plan	
Health Care Federal Employee Program	Highmark Blue Cross Blue Shield West Virginia	
Pharmacy	HealthNow New York Inc.	
Retail/Service	Cogeco Connexion (Storefront)	
Energy	FortisBC	
Telco/TV	Cogeco Connexion	
Helpdesk	Blue Cross Blue Shield of Michigan (Web Support Help Desk)	
Government	Halton Region	
Business to Business	Marchon Eyewear Inc.	

Highest Customer Experience for the Contact Center Industry Awards

Category:	Organization:	Criteria:
Best Selling Customer Satisfaction	Vancity	This award recognizes the contact center with the highest Csats (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	BlueCross BlueShield of Vermont	This award recognizes the contact center with the highest overall Csats (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 Csats (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 Csats (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 Csats (top box response) rating for the field services channel.

AWARD WINNERS & FINALISTS LISTING

EMPLOYEE EXPERIENCE AWARDS

Highest Employee Experience 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 Experience Award

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

Highest Employee Experience 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.
Insurance	VSP Vision Care	
Health Care	BlueCross BlueShield of Vermont	
Outsourcer	TELUS Employer Solutions Inc.	

Highest Work From Home Employee Experience

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 Experience Awards

Organization:	Criteria:
BlueCross BlueShield of Vermont	Based on having 50% or higher of employees rate their overall experience of working in the contact center as very satisfied (top box response) rating.
Canadian Tire Financial Services (CRCC)	
Canadian Tire Financial Services (CTCR)	
Jackson	
TELUS Employer Solutions Inc.	
VSP Vision Care	



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 (CX) measurement, benchmarking, and consulting. As a consultant, Mike has experience working with leading North American organizations on improving CX. Mike has developed several key best practices that are fundamental to providing world class contact channel customer experiences. 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 CX improvement. Mike is a pioneer and visionary in contact channels' CX measurement of first call resolution, one contact resolution, omni-channel, CX greatness, customer emotion, and retention metrics. Mike has written five thought-provoking contact channel CX research 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, Blue Cross Blue Shield, and VSP Vision Care. In addition, Mike is a popular contact center industry thought-leader with over 17,000 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.



LARA POW

President

SQM Group

Lara has a Doctorate in Business Administration and a Master's degree in Mathematical Physics. Lara is a member of the Insights Association, American Marketing Association, and American Association for Public Opinion Research. She has over 10 years of research and analysis experience. Lara has contributed to the research for SQM's books, World Class Call Center, First Call Resolution, FCR Best

Practices and co-authored SQM's most recent books, One Contact Resolution (1st and 2nd Edition). Lara oversees all aspects of operations for SQM's two contact centers including finance, technology, data processing, and product development.



CONFERENCE SPEAKERS



ALEX LANG

Workforce/Quality Analyst

Security Health Plan

Alex Lang is the Workforce/Quality Analyst for the Customer Service department at Security Health Plan. Alex joined Security Health Plan's call center in 2014 as a representative and has served in his current position for the past year. Alex has been a key driver of Customer Service efficiencies by implementing such enhanced capabilities as improved IVR systems, more robust agent metrics, and an automated scheduling program. Alex also tracks, trends, and analyzes all member survey information to continually raise the bar on voice of the customer metrics.



CHRISTINE REILLY

Partner and Chair

Manatt, Phelps & Phillips, LLP

Christine Reilly is partner and chair of the Telephone Consumer Protection Act (TCPA) Compliance and Class Action Defense group at Manatt, Phelps & Phillips, LLP. She defends companies in consumer class actions and other major civil litigation in various areas, including consumer protection, unfair competition, and false and deceptive advertising. Christine regularly defends companies from claims brought under the TCPA, and she frequently writes and speaks on TCPA compliance. Christine received her B.A. from Cornell University and her J.D. from the University of California at Berkeley, Boalt Hall School of Law.



EMMA DELLALIAN

Manager of Learning & Compliance

Canadian Tire Financial Services

Emma Dellalian is manager of Learning System & Compliance, in the Customer Service & Operations division of Canadian Tire Financial Services. She leads a team of learning experience professionals who are focused on driving modernization and sustainability of the contact centre learning system. Emma has held a number of Business Analyst roles supporting the contact centre over her 15 years at CTFS. In these roles, she has applied her continuous improvement mindset and passion for customer experience excellence.



CONFERENCE SPEAKERS



JACKIE HEAVEN-AH HI

Assistant Director Customer Service

Regence Blue Cross Blue Shield

Jackie Heaven-Ah Hi is Assistant Director of Customer Service at Cambia Health Solutions, where she leads the company's engagement with customers and drives for optimal customer satisfaction. She has spent her career focused on customer service, including the past 12 years at Cambia and its affiliated health insurance plans. Jackie is part of the leadership team that sets the vision for Cambia's service teams and aligns that work with the larger company goals, always with customer

impact in mind. Her teams have a demonstrated record of success, in large part due to Jackie's leadership and the way she has engaged employees in improvements.



JANALEE WILLETT

Call Center Operations Manager II & Ulysses Master Coach

BlueCross BlueShield of Vermont

Janalee Willett has been with BlueCross BlueShield of Vermont for 18 years, having held various roles from call center representative, quality assurance and training specialist, to her current role as call center manager and Ulysses Master Coach. Under Janalee's leadership, BlueCross BlueShield of Vermont's call center has achieved SQM world class certification for four consecutive years, and best performing small-

to mid-sized contact center for three consecutive years. Janalee was recognized by SQM with the Supervisor of the Year award in 2016.



JENNIFER CARBONE

Senior Director of Member Service

Blue Cross Blue Shield of Massachusetts

Jennifer Carbone is the Senior Director of Member Service at Blue Cross Blue Shield of Massachusetts. Jennifer has 23 years of contact center experience in the health care industry. In addition to contact center leadership, she has led service strategy development and contact center operational functions including training, quality, workforce planning, project management and research. She holds business degrees in marketing and management.



CONFERENCE SPEAKERS



JULIE LAMARRE

Sales Manager Consumer Market Cogeco Connexion Inc.

Julie Lamarre is a Sales Manager Consumer Market in Quebec for Cogeco Connexion Inc. In this role she is responsible for managing the Storefront (kiosk) Supervisors and Door to Door Team as well as liaising with Cogeco's many Retail Partners located within Quebec. Julie has held many positions within Cogeco in the past 22 years she has been with this company, first as a Contact Centre Agent and then Trainer before becoming a Contact Centre Supervisor. She has worked on many projects throughout her career at Cogeco, including the launch of digital television in 1999.



KATHY RODINE

Vice President of Customer Care Operations VSP Vision Care

Kathy Rodine has been with VSP Vision Care for over 28 years. Her current role is Vice President of Customer Care Operations, which encompasses responsibility for Claims processing and Call Center servicing for 80+ million members. Over Kathy's career, she has led a number of key initiatives and contributed to VSP Customer Care's reputation as a World Class service provider. Kathy is a leader in building and motivating teams to achieve established goals as evidenced by SQM Group awarding her with the FCR Leader award in 2015.



KEN BAUR

Director of Member Experience and Contact Center Services Security Health Plan

Ken Baur is Director of Member Experience and Contact Center Services for Security Health Plan of Wisconsin, Inc. Ken joined Security Health Plan in 1999 as Customer Service Manager. He has been in the customer service industry his entire career. Ken had direct leadership oversight of Security's Enrollment and Mail Center Services as Assistant Director of Service Operations. He has progressively led the Customer Service Department from an initial 10-seat call center in 1999 to its current peak of 60 agents. Ken received SQM's FCR Champion award in 2015.



CONFERENCE SPEAKERS



KIRSTEN HINTON

Supervisor Support Queue & Leadership Talent Development **VSP Vision Care**

Kirsten Hinton has been a supervisor with VSP for 13 years, and has managed the Support Queue and Leadership Talent Development for the last 3 years. In her 17-year tenure at VSP she has served as a Customer Service Representative, Support Queue Representative, Leadership Talent Development, and a member of the SQM team. Prior to VSP she held leadership roles in banking and the restaurant industry.

She is passionate about customer satisfaction, coaching and preparing VSP's future leaders.



LISA MOODY

Director of Customer Care **World Vision Canada**

Lisa Moody is the Director of Customer Care at World Vision Canada, where she provides leadership and oversight to the contact centers in both Mississauga and Montreal. In this capacity, she drives the achievement of shared marketing revenue targets from across the Customer Care division. With the ever-growing need to acquire well-engaged and loyal donors, central to Lisa's role is the motivation of over

150 staff members, in teams of inbound and outbound telemarketing agents, to deliver a meaningful and highly customer-centric experience.



MATT TOMLINSON

Global Director of Innovation, CX Labs **EA Worldwide Customer Experience**

Matt Tomlinson has been the Global Director of Innovation for the Customer Experience Labs of Electronic Arts (EA), for the past four years. As a lifelong gamer, Matt always dreamed of working at EA. He was recruited to build an innovation lab focusing on the future of delivering amazing customer experiences. The lab is currently experimenting with a variety of disruptive technologies such as 3D printing, artificial intelligence,

cognitive virtual agents and deep learning. He is excited to share the insights and discoveries his team has made with artificial intelligence and how it's poised to change the customer experience landscape.





CONFERENCE SPEAKERS



NATIA ALFIERI

Consumer Market Sales Operations Manager Cogeco Connexion Inc.

Natia Alfieri is a consumer market sales operations manager for Cogeco Connexion Inc. She is responsible for performance in storefronts and in the field across Ontario, which includes field sales technicians, door to door sales associates, third party retailers, storefront associates, and representatives in a contact centre that works closely with outside sales channels. Natia has held an array of jobs in her 15-year tenure with Cogeco Connexion, including roles in workforce management, management in second level support (Sales & Service and Technical Support), management of a specialty team focused on improving First Contact Resolution, and escalation management in the Office of the President.



PENNY GARRETT

Vice President of Customer Service Regence Blue Cross Blue Shield

Penny Garrett brings three decades of proven success and award-winning service in call centers to Regence, where she has led teams for the past eleven years. She leads a 450-person team of customer service professionals charged with helping people through their healthcare journey. She is responsible for strategic planning, and has created a cohesive culture in multiple locations across four states, resulting in consistent and high customer satisfaction throughout the enterprise. Penny also represents the voice of the customer in departments across the enterprise to influence business decisions that improve the customer experience.





Internal Resolution Reporting

Through analysis of the transaction files that are sent to SQM for surveying, SQM provides Internal Resolution Reporting which calculates the % of records where there is not a repeat contact within a specified time-frame.

TOP 5 FEATURES & BENEFITS

1	PERFORMANCE ACCOUNTABILITY	Supports holding CSRs and supervisors accountable for their call resolution performance, either with or without voice of the customer (VoC) call resolution.
2	SUPPLEMENT SURVEY QUOTA	Supplements survey quotas as an alternative for VoC FCR or Call Resolution when there is low survey volume.
3	MEASUREMENT OF REPEAT CONTACTS	Calculates and measures the percentage of records where there is not a repeat contact within a specified time-frame.
4	CALL RESOLUTION INDEX (CRI)	Provides CSR, Supervisor and organization levels with a single measure combining Internal Call Resolution and VoC Call Resolution.
5	BENCHMARKING OPPORTUNITIES	Offers accurate Internal FCR and Call Resolution measurements for benchmarking through standardized business and call list rules.

LEARN MORE ABOUT INTERNAL RESOLUTION REPORTING

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

The background is a dark blue gradient with a pattern of overlapping circles. Each circle contains a white icon representing a different contact center channel or concept: a computer monitor with a line graph, a Twitter bird, a speech bubble with three dots, a yellow envelope, a telephone handset, a smartphone, a person wearing a headset, a speech bubble with three dots, a person wearing a headset, a yellow envelope, a Facebook 'f', and a Twitter bird.

CONTACT CENTER OF THE YEAR

BEST PERFORMING
SMALL- TO MID-SIZED
CONTACT CENTER

GREAT CX STORIES

CONTACT CENTER OF THE YEAR

VSP VISION CARE



VSP Vision Care, a VSP Global company, is the largest and only not-for-profit vision benefits provider in the U.S. It provides access to high-quality, affordable eye care and eyewear for 88 million members around the world through a network of 39,000 eye doctors. VSP reinvests profits back into the members and communities they serve so that everyone can enjoy a lifetime of good vision.

customer needs are a top priority, and they are provided with skill development opportunities and are empowered to handle virtually any customer issue. In 2017, over 90 percent of eligible CSRs were certified World Class by SQM Group.

First Call Resolution Performance: VSP's FCR rate captures the company's ability to deliver service effectively and efficiently. In 2017, VSP Vision Care had a live call volume of more than 7.6 million, and with a highly-dedicated team of service professionals, the call centers hit an 88% FCR rate. FCR rates at VSP Vision Care Call Centers have improved incrementally over the years. The steady improvement can be attributed to a strong focus on the customer experience, which is determined through regular and ongoing feedback. The voice of the customer is also integrated into key performance metrics at all levels in the call center.

It is with great honor that SQM awards VSP Vision Care as the winner of the 2017 Contact Center of the Year Award, which is now their fourth time winning this prestigious award!

It is this shared belief that everyone deserves to see their world clearly that helps inspire VSP's customer service representatives (CSRs) to provide a World Class experience for VSP customers. This is done through high-quality service experiences, first call resolution (FCR) performance, and employee satisfaction.

High-Quality Service Experiences: Over the past 16 years, VSP Vision Care has continually sustained levels of World Class customer service and employee satisfaction. This success has been achieved because VSP's CSRs recognize the direct impact of their individual performance on the customer. They know

Employee Satisfaction: VSP Vision Care has a highly dedicated team of service professionals who believe in their ability to strengthen the relationship between patients and their eye doctors. CSRs are celebrated for their successes and are empowered to improve their own performance as well as the customer experience.

By bringing together the value of quality service and a team of highly-empowered individuals, VSP Vision Care call centers continue to deliver World Class customer service which is deeply rooted in the common goal for everyone to enjoy good vision.



BEST PERFORMING SMALL- TO MID-SIZED 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 members' issues through to resolution. Advocating for our members, ensuring FCR, and fostering positive relationships with both our internal and external customers is engrained in our corporate culture throughout our organization. This member-centric focus has 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 used 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 helps to maintain our primary focus, the 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. Everything gets tied back to member experience, ensuring first call resolution. This 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 CSRs 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 they are on, and not the calls in the queue, regardless of how long the call might take. We support their advocacy services as it ultimately results in a positive member experience, a CSR who is empowered and values their role, and a resolved call.

Quality Assurance: We believe that a QA program can serve a vital role in any organization. It helps ensure customers receive accurate and complete information, the organization meets association and accreditation requirements, and it serves as a great learning and development tool. In addition, the way you incorporate QA into your culture and how you communicate about that program is just as important, if not more, as the evaluation itself. Incorporating QA into the fabric of the call center and expressing the value it brings to the customer experience, the Plan, and the individual, can be a huge driver in employee satisfaction and how employees perceive the program. Thus, we have taken the time to ensure our teams understand how to make those connections.

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 canceled due to call volumes and staffing. Their growth, development, and success are important to us; they are important to us. Not only does this strengthen our team by improving knowledge and confidence, but it also has a positive impact on team morale.

Our commitment to the member experience is engrained in our culture. Ensuring a positive customer experience and seeing our members' issues through to resolution is priority number one.



Carlos Brathwaite

A SPECIAL CONNECTION

VSP Vision Care

A member of VSP called in asking for a VSP doctor directory. Although this is a routine inquiry, it is the special connection developed during this 22-minute call that made it exceptional. At the beginning of the call, the member had a bit of a feisty manner, and Carlos knew she was going to give him a run for his money. She was an elderly woman and acknowledged it was hard to keep up with insurance and how it works, so Carlos tailored his pace to hers while ensuring she kept her dignity. He asked her if he could e-mail the information to her and she responded back, “I don’t have a fax, Carlos.” In a fun and caring way, he gently told her that he mentioned nothing about a fax, and then they had a good laugh. She mentioned her struggles with technology and how her grandson was talking about an iPod, but she had no idea what he was talking about. Carlos never missed a beat, and said he had the same problem with technology, and “we are one of the same.” He let her know where the doctor directory was coming from and to check her spam folder. She laughed and felt proud because she told him she knew exactly where her spam folder was located on her computer. He responded by saying, “Look at you – now you are just showing off.” There was another burst of laughter by both.

Carlos repeatedly clarified many points during the call. Carlos remained patient and never lost his sense of humor. She indicated that she had a hard time with insurance, so Carlos showed her the simplicity of how her plan worked to give her a confidence boost for when she went to her VSP doctor’s office. She was concerned about only having ten doctors to choose from, and he immediately sent her 25 more. She then asked him, “Carlos, can I call you at this number

again.” He replied, “you got it, but you can’t crank-call me.” Laughter was heard all the way around.

After her issue was resolved, the member told Carlos the following about her experience with his service: “Carlos, you have been very helpful. You are professional, thorough, knowledgeable, and very patient. More so than all of that – very kind. Kindness goes a long way with me especially being an older, retired individual. It means a lot when you represent the company by providing exceptional service, so I thank you because you went over and above. I am a customer of your company who is highly satisfied with the type of representative that you are – like I said, kind and patient. When you are talking to older individuals like me, it takes a special person to tap into and fulfill our needs and anticipate how to help because we are in the dark when it comes to these things. We are a little fearful and intimidated about asking the right questions and not missing anything. Since I had an exceptional bonding with you helping me, I am very happy, and wanted to thank you and your company. Thank you, Carlos.”

Carlos will never forget the interaction he had with this customer, and the bond created will never be forgotten – by either of them. How many friends and family will she tell about this warm interaction, the shared laughter, about VSP and the kind and patient Carlos? I can confidently say quite a lot.



GREAT CX STORIES

Donna Poirier

PUTTING HERSELF IN THEIR SHOES

Cogeco Connexion

Donna's goal for 2016 was to achieve a World Class certification and when she fell short she took action. For 2017, Donna set herself a goal that she would work hard to improve her overall SQM results. She started with a deep dive into unresolved calls by utilizing the SQM portal for feedback directly from the Voice of the Customer. Once she identified her areas of opportunity, Donna asked for feedback from her coworkers that do well on call types that she identified as areas of opportunity. Some feedback Donna received from her colleagues was to slow down her delivery of information to customers and to make empathy a focus. Donna readily took this feedback and incorporated the advice into her approach.

Donna noticed from checking her SQM portal that a call type causing routine customer dissatisfaction was service outages. Recently Donna's father had a medical issue and she witnessed first-hand how difficult life can be for someone when their services aren't working. Donna said:

"It was an eye opener for me and for every call where there was no service I kept my experience with my dad in the back of my mind, especially the joy people experience when their service is restored. When the issue is resolved, I feel that I've helped my

customer and that their life can go back to normal. A lot of my surveys in 2017 emphasized how patient I am on the phone because I want to understand, help, care, and resolve my customer's issues."

"I want to understand, help, care, and resolve my customer's issues"

A specific interaction showing Donna's patience and white glove service provided to a customer took place in October of 2017. Donna exhausted all resources available to help a customer program Cogeco's TiVo remote to their television. Eventually Donna had to refer the customer to their TV manufacturer's support line. This call was surveyed by SQM and resulted in a World Class survey. Donna's customer satisfaction was "Very Satisfied" with the following comments:

"She was excellent. She was very, very patient. I didn't feel rushed and then in the end she gave me the direct number to call because it ended up being a TV problem. I couldn't have been more pleased." Another call that stands out to

Donna that she is particularly proud about is a customer calling 15-30 times a day over the period of a month. The reason the customer kept calling was because he required assistance for TV inputs. Even with clear notes left by previous CSRs how to fix the issue and as well as having a tech sent to the customer's home this issue continued to occur. After speaking with the customer's daughter, Donna learned the customer had an accident and the issue was caused by him holding the remote and not knowing/remembering that he hit the buttons. When looking at the type of remote the customer had she was able to find a different remote that allowed the customer to properly hold the remote. Donna resolved this repeat caller's input issue and they no longer had to go through the stress of calling multiple times a day and missing their programming.

Donna achieved her goal of being a world class agent for 2017 and improved her World Class Calls by 10%. This is something Donna is extremely proud of and as her supervisor I can confidently say she is doing a tremendous job taking care of our customers and incorporates SQM best practices daily into her calls.



Jennie Stevens

VALUING MEMBER EXPERIENCES

BlueCross BlueShield of Vermont

As many customer service representatives may know, we do a lot of work that may not be appreciated because it is “behind the scenes”, but every now and again, you have a positive impact on a valued member, and that makes it all worth it. One member is all it took for me to feel like I could make a difference, even if it was in a small way.

One morning, I received a call from a mother with a young child. I could tell she had been crying and I could hear the panic in her voice; my heart went out to her. The family was traveling, and her child’s nutrition formula had been lost in the luggage they checked. The mother was worried and had no idea what to do. Additionally, this specific formula that her child needed to survive was expensive and she had no idea where to get replacement formula. She called around to providers in her area with no success. Feeling hopeless and out of options, she called BCBSVT and reached me.

I reassured her that I understood the seriousness of the situation, would make sure she got the formula she needed. I also reassured her that I would take ownership of this and resolve her issue. After finding out where she was located, I looked up pharmacies in her area and reached out to each one to verify if they had the specific formula that her child needed. After calling six pharmacies with absolutely no luck,

I was starting to get worried, but I didn’t lose hope; time to try a new approach. I met with one of my team leaders, and we brainstormed options to resolve this issue. We decided the best next step was to outreach to durable medical equipment suppliers in that area in hopes they had more information and the formula in stock. Due to restrictions, I was unable to contact suppliers directly, so I called our sister Plan for assistance. The sister Plan representative understood the urgency of the situation and committed to helping me find a resolution. While I remained on the line, she called three local durable medical suppliers that were in our member’s network. Thankfully, the third supplier had the formula in stock. Then, I ensured the appropriate authorization for this supplier was in place, so the claim would not reject. On the member’s behalf, I reached out to the members’ designated nurse case manager and informed her what was going on. She was surprised and grateful for my level of effort to find a durable medical supplier and put an authorization in place. Everything was completed within two hours of the member reaching out to us for help.

I was excited to call the member back and give her the good news. I knew how incredibly stressful and scary this experience was for her, and the thought of her child being

without the formula was a serious concern for me as well. I told our member where to pick up the formula, confirmed that we verified the specific formula was in stock and ready to go, and authorization was in place, so she would not have to pay out of pocket for the formula. I could hear her voice go from worried to relieved which made everything I had done completely worth it. She told me that she knew we were just her insurance company and that it was not our problem, but she was thankful she could focus on her family and not spend hours on the phone. I reassured her that this is exactly what we are here for, that we value our customers and their experiences, and we truly want to help see them through any health care obstacle that may arise.

I feel fortunate that I work for a company that values the member experience and supports its call center staff in taking the time needed to ensure first contact resolution. By working collaboratively with my team lead, our Integrated Health nurse case manager, and our sister Plan, we were able to take this member out of the middle of a difficult situation and work together to see her through. That is why I love my job!



GREAT CX STORIES

Shandra Roberts

PUTTING CUSTOMERS AT EASE

Premera Blue Cross

Listening to one of Shandra's calls, you feel as if she is talking to her best friend, her grandmother, or her mom. She has a way of putting her customers at ease, always assuring them that she is there to help. She never leaves an issue unresolved and will go the extra mile to ensure her customers are satisfied. Often, what our customers need is someone to listen, and help them through a difficult time. This is the case in Shandra's call with a customer who desperately needed her on the day she called in.

The customer was calling Premera Blue Cross as her husband had been admitted to hospital after a stroke. The customer was simply calling to make sure that her husband was authorized for his hospital stay, but Shandra could tell there was much more on her mind. After Shandra assured her that his hospital stay had been approved, she probed a bit to see if the customer needed any other help as she could hear the customer fighting back tears. Shandra learned that the customer and her husband had been married for over 50 years, and the customer had never handled finances or insurance matters. The customer felt overwhelmed and wanted to stay by her husband's side, but also needed to take care of the bills and the house and worried she couldn't do it all. Her husband was not able to communicate very well, and she wanted to be there to speak to the medical staff. She shared that she had to leave her husband for a bit as she had animals at home to care for, and during that time, her husband was given the wrong lunch and choked – which landed him in the Intensive Care Unit where he developed pneumonia. They were not sure if her husband would pull through. She was devastated and just needed someone to talk to, which is where Shandra came in.

Shandra listened to the customer talk about her life with her husband. Shandra assured her that she was doing an amazing job taking care of her husband, and to just take it minute by minute. They cried a bit together and

had a few laughs. At the end of the call, the customer told Shandra she believed everything happens for a reason and she was meant to call Blue Cross that day. She believed that Shandra was her angel and was sent to make her laugh. The customer said their conversation, "felt like she was having coffee and chatting with an old friend who made her laugh," and it gave her, "a break from all the craziness." A few months later, the customer called back and got Shandra again. Shandra heard her say to her husband, "I thought this was my Angel I was talking to again." Her husband was back home and had fully recovered. She kept telling him during the call, "this is that great lady I talked to when you were in the hospital. Remember, I told you about her?"

This was a call that stayed with Shandra, and she realized her ability to impact others and make someone smile in their most difficult hours. Shandra had this to say about her experience with the customer, "So there it is - the customer who impacted my life. When we talk to customers who are calling about their insurance, most of the time it's because they are having health issues. You hang up never knowing the outcome. I realize that if I can make just one person smile and feel a bit less scared during a phone call, I can hang up knowing that I've done my job well."

This is just one of Shandra's customer stories. Shandra has also eased a customer's mind by giving exact directions to a health clinic, noting the best time of day to go. She uses empathy and understands the various needs of her customers. She helps elderly members through the transition to Medicare with ease, ensuring comprehension the entire call. Shandra uses all resources available to help her customers and often uses understandable analogies to explain complex issues clearly. She is positive and upbeat, yet able to calm customers in challenging situations.



Haron Hofioni **PATIENCE IS KEY** Scotia iTRADE

Working in a customer service role is one of the most rewarding and exciting roles. Interacting with a variety of customers daily and servicing each client to meet their individual needs takes effort and constant adjustment. For example, clients who are going through different stages of life have different goals and aspirations. Some clients want you to move at a very fast pace or slow things down so they can keep up with you. Working at an online brokerage further emphasizes the excitement. You deal with a range of emotions, and since markets are volatile, time is money. Working as an SQM World Class Certified CSR means keeping all of that in mind, and still going the extra mile.

At Scotia iTRADE, we have two fundamental models to help guide us towards providing a superior customer experience; the iCare and the Customer Experience Model. I used both of these important models when I received a call from a new client who was frustrated. He could not figure out how to access his account and was looking to place his first trade. When you are new to something, like trading on an unfamiliar platform, the whole experience can be overwhelming. It was something I understood as I had the same experience when I started working at Scotia iTRADE. I related to the client by adapting to the client's knowledge, experience, and pace. Instead of simply doing what the client asked by manually resetting his password, I helped him become a more self-sufficient client by walking him through how to reset the password. I committed to teaching him everything he wanted to learn, and more. Once he discovered how simple the process was and started gaining confidence, I walked him through how to transfer funds from one of his linked bank accounts into his brokerage account to place a trade. The client was delighted to know that he could instantly transfer funds from his bank account and place a trade, all in the same day. In situations like this, I always feel it is important to be completely

transparent and proactive with the client by breaking down everything they may come across during the process, so they don't encounter any surprises, all of which adds value for the client. Once all was said and done, the client's trade went through, his balances covered, and passwords reset.

I think it is important to empathize and remember that we have all been in the clients' shoes and had things with which we needed help. We are all taught that we should go the extra mile, but we can only do that if we have inspiration. Patience is key, and with most customer service roles being in fast-paced organizations, sometimes this is forgotten. You need to give clients time to learn and discover all that they are capable of doing so they can build their confidence. In some situations, giving clients that extra time is going the extra mile. You can spend years building up the client base of an organization, but what good is that if you cannot give them the extra time they need to have a fully satisfying, and joyful customer experience?

In the end, the most rewarding parts about this experience were the amount of confidence the client gained, that the client was finally able to place a trade for the stocks he always wanted, and it made me happy about the job I had done. The icing on the cake came a few weeks later when I was called over by my manager and presented with a wonderful hand-written letter from my client. Having a client go out of their way to spend the time to send a hand-written letter to compliment you on how good of a job you did, and how great of a customer service experience they had was unheard of. For me, I am inspired to give 110% on every call no matter how tough the call is or how frustrated a client may initially be, because, in the end, they are just like us. They want someone who is willing to be patient, have all their questions and concerns answered and solved to their total satisfaction, which is why I will always go the extra mile.



GREAT CX STORIES

Juliana Klingel

FOLLOWING YOUR INSTINCT

Marchon Eyewear

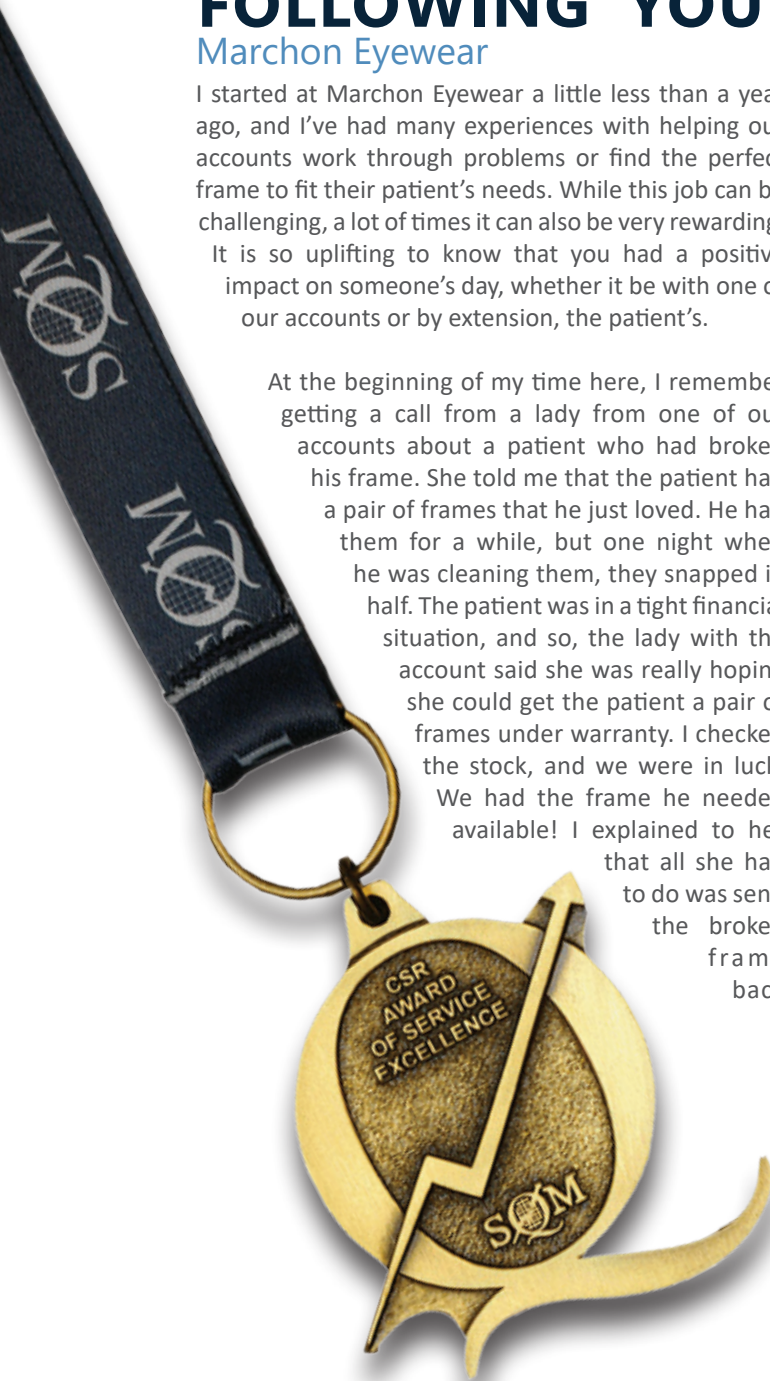
I started at Marchon Eyewear a little less than a year ago, and I've had many experiences with helping our accounts work through problems or find the perfect frame to fit their patient's needs. While this job can be challenging, a lot of times it can also be very rewarding.

It is so uplifting to know that you had a positive impact on someone's day, whether it be with one of our accounts or by extension, the patient's.

At the beginning of my time here, I remember getting a call from a lady from one of our accounts about a patient who had broken his frame. She told me that the patient had a pair of frames that he just loved. He had them for a while, but one night when he was cleaning them, they snapped in half. The patient was in a tight financial situation, and so, the lady with the account said she was really hoping she could get the patient a pair of frames under warranty. I checked the stock, and we were in luck. We had the frame he needed available! I explained to her that all she had to do was send the broken frame back

with a copy of the invoice and that she would be credited for the broken frame. But unfortunately, she wasn't sure what the warranty period was. I explained that it was a two-year warranty from when the frame was initially purchased. When we looked up the invoice, we realized that it had just been outside of the warranty by a few weeks. I could tell she was disappointed. However, she was very kind about it saying that she understood and would let the patient know. I was brand new at Marchon and had been out on the floor for maybe a month, so I was nervous about pulling strings. However, my trainer Kristie told us during training that, "you never wanted to end a call on a negative note, and you can tell that you made the right decision on a call if you walk away from it feeling good." Kristie told us to always follow that instinct, so that's exactly what I did. I told the lady from the account, that given the circumstances, even though the frame was outside the warranty, I would just send her the frame free of charge, especially because her patient was such a big fan of his frames. She was beyond over-joyed, and you would have thought she won the lottery. She said she couldn't wait to call her patient to let him know, and that she would always remember what Marchon did for her that day.

That call had such a positive impact on me. Since I was new at Marchon, I was nervous about my career change. I used to work with children, and I loved helping them learn and watching them grow. I didn't know if I'd be able to connect with people in the same way at my new job, but this call reassured me that I had made the right decision. I am so happy and proud to work for a company that allows me to continue to help those around me.



CONFERENCE ENTERTAINMENT



FIRE & ICE THEMED DINNER WITH ENTERTAINMENT

**Tuesday, May 22nd
6:00 pm - 9:00 pm**

The first evening of the conference is planned for you to enjoy a spectacular Fire & Ice themed night with entertainment. Witness the elements of fire and ice brought to life through ice sculptures, costumed characters, and a thrilling performance from Kinshara Performance Troupe that will mix danger and delight! We welcome you to come dressed up as fire (red or orange) or ice (blue or white) to join in the fun!



WESTERN THEMED DINNER WITH ENTERTAINMENT

**Wednesday, May 23rd
6:00 pm - 10:00 pm**

Join us for a Western themed evening. Bring your cowboy boots and plaid shirts, and be ready to enjoy a great time! Back by popular demand, the entertainment for the night is the Young'uns. Voted "Best of the Okanagan" 2016, 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 night 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.



CASINO ROYALE NIGHT

**Thursday, May 24th
9:00 pm - 12:00 am**

After the gala awards dinner evening, SQM invites you to join us in continuing to celebrate with a Casino Royale night. Double down and let the roulette wheel spin! Enjoy a jackpot experience by trying your hand at Texas hold 'em, Blackjack, Roulette, Casino Wheels and more! DJ Cherry OnTop will be spinning tunes in the Fireside Lounge until midnight or go see John Noren playing live music in Barrique & Java.

CSR APPRECIATION DAY ACTIVITIES

One of the best practices for providing and improving great CX is recognizing CSRs' Voice of Customer performances. SQM's CSR Appreciation Day held during our annual conference is one of the best ways to recognize and celebrate your CSRs' success! Give them unique experiences such as a spa day, wine tour, or an adventure outing where they then finish off the day by attending the most prestigious event in the contact center industry at the CX Industry Awards Gala dinner.



KAYAKS AND SPIRITS

The Okanagan Valley is known for its beautiful and majestic lakes. This kayak adventure is fantastic for water lovers. Departing from Kalamalka Lake beach ("the lake of many colors"), enjoy a leisurely paddling tour on a mixture of individual and tandem kayaks. In the afternoon, change pace for a visit to Okanagan Spirits, a local farm-to-flask distillery offering a selection of more than 25 internationally awarded spirits. Learn about the art of craft distilling, and from the tasting bar sample a selection of their finest offerings including fruit brandies, liqueurs, single malt whisky and more!

OKANAGAN LAKE HOUSEBOAT CRUISE

See the North Okanagan from a beautiful fully licensed 42' houseboat named "Spirit of the Okanagan". This scenic and leisurely tour allows passengers to relax while they experience the amazing landscapes of Vernon and area from Okanagan Lake. Enjoy the open air from the upper sun deck or from inside the covered area of the boat for a truly memorable experience. The lake is home to several species of fish, including rainbow trout and kokanee. It is said by some to be home to its own lake monster – a giant serpent-like creature named Ogopogo.



KELOWNA EAST BENCH WINERY TOUR

This fun and informative winery tour includes tastings at three wineries on the eastern slopes of the Okanagan Valley, overlooking the shores of Lake Okanagan. Tantalus Vineyards, the site was first planted to table grapes in 1927 and today is known as the oldest continuously producing vineyard in British Columbia. Summerhill Pyramid is well-known for its organically grown grapes and a finishing process whereby all wines are aged in the winery's impressive pyramid cellar built with precision and based on sacred geometry aligned to the stars to create a structure of stillness and harmony. CedarCreek Estate Winery boasts four generations of agricultural heritage, the winery has produced some of the valley's best wines resulting in CedarCreek being twice recognized as "Canada's Winery of the Year".



CSR APPRECIATION DAY ACTIVITIES



ZIPLINE ADVENTURE

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, halfpipe slack lines, 1500' long lines and trap-door starts. 7 stations one after-the-other with speeds clocked as fast as 85 km/hr!

PINOT AND PICASSO

With a brush in one hand and a glass of wine in the other, join us at The Chase Wines for a day of art at the vineyard. Treat your palate with fine wine and tasty tapas, inspiring your palette with the guidance of a professional artist. Express yourself! Getting creative is good for the soul and everyone is encouraged to bring their own inner artist onto the canvas in this fun and totally light-hearted atmosphere. The Chase Wines is Lake Country's newest winery and culinary destination, located on a picturesque property with panoramic views of surrounding orchards, vineyards, rolling mountains and the glistening water of Okanagan Lake.

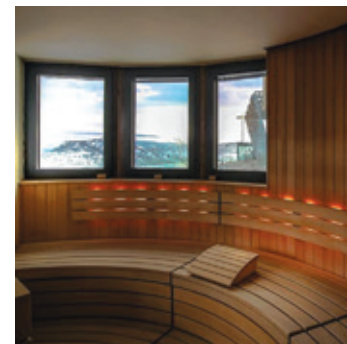


GOLF THE PREDATOR AT PREDATOR RIDGE

Designed by legendary course architect Les Furber, the Predator course offers a challenge for every level of player and is one of the best offerings of golf in Canada. The rolling hills, long grasses and undulating greens make for a truly unforgettable golf experience. The course has previously hosted the Telus World Skins Game both in 2000 and 2008. From the Tournament tees the Predator course measures 7,090 yards with a slope rating of 137 and a course rating of 74.2.

KURSPA TREATMENTS AT SPARKLING HILL

A blend of the German word for 'healing' and the Latin word for 'water', the name KurSpa personifies the holistic value of health and wellness in mind and body. Uniquely infused with a custom Swarovski crystal architecture, KurSpa is the largest among luxury spas in Canada and the first in North America to offer Europe's popular Cryo Cold Chamber as one of its signature treatments. Guests will select one of four wellness spa packages, each including two treatment options. Enjoy access to KurSpa amenities including a variety of uniquely themed steam rooms, saunas, experience showers and pools, or enjoy stunning lake and mountain views from Sparkling Hill's serenity relaxation room.



ABOUT SQM

SQM's primary purpose is to help organizations improve their customer and employee experience performance by being a specialist for conducting CX research, consulting to improve CX, and awarding organizations that have demonstrated CX excellence.



CX Research

SQM is a leading research specialist firm for benchmarking, tracking, and improving customer and employee experience.

Since 1996, SQM has been a leading voice of the customer experience (CX) research specialist firm that accurately measures, benchmarks, tracks, and identifies opportunities for improving contact channels and organization interaction CX. In addition, we use open-ended questions with a sophisticated CX tagging system to assist companies in actioning CX data and feedback.



CX Consulting

SQM's consulting approach is based on best practices required to improve CX and draws upon years of client work and research.

SQM provides consulting expertise to assist organizations in their CX improvement efforts. SQM can validate if your contact center practices are best practices. Our understanding of people, process, and technology best practices for improving CX is unsurpassed in the contact center industry. SQM assists companies in conducting CX journey mapping. The primary purpose of CX journey mapping is to conduct voice of the customer survey research and in-depth interviews with customers to understand what they experience for each interaction and contact channel key moments of truth and, most importantly, to discover CX improvement opportunities.



CX Awarding

SQM's customer and employee experience and best practices awards are the most prestigious and sought-after industry awards in North America.

For over twenty years, SQM has been awarding organizations for CX, employee experience (EX), and CX Best Practices. SQM awards are considered the most prestigious and sought-after North American contact center industry awards, as they are based on customers who have used a contact center, and/or employees who work in a contact center. We have more than 60 different awards and recognize the top performing organizations for CX, EX, and CX Best Practice performance. SQM benchmarks over 500 leading North American contact centers on an annual basis. SQM award winners include American Express, AmeriHealth Caritas, Canadian Tire Financial Services, Marriott, FedEx Express Canada, Capital One, VSP Vision Care, and UPMC Health Plan.



CX LIFECYCLE BENCHMARKING STUDY

GET TO KNOW YOUR CUSTOMER

Understand your customer's overall experience with your organization by measuring and benchmarking CX Lifecycle.

SQM's CX Lifecycle Benchmarking Study measures and benchmarks CX through the different lifecycle steps of researching, purchasing, on-boarding, using products and services, and being loyal to an organization.

LEARN KEY INSIGHTS ON:

- Which interactions prevent customers from viewing the organization as world-class
- Drivers of satisfaction and dissatisfaction through the CX lifecycle steps
- Areas of improvement for various interactions
- Performance measurements segmented by various lifecycle steps



TOP 5 FEATURES & BENEFITS

1 ALL SURVEY METHODS IN ONE PLACE	Store your phone, email, website pop-up, face-to-face, IVR, and kiosk surveys in one place to provide simple, consolidated reporting.
2 COMBINE INTERNAL AND EXTERNAL DATA	Combine internal data with voice of the customer data to provide holistic insights on customer experience performance.
3 CUSTOM DATA SEGMENTS	Create access levels geared towards contact center operators, self-service marketers, and CX Senior Leadership groups, allowing each level to look at targeted opportunities for improvement.
4 TARGETED SURVEYING QUOTAS	The ability to manage specific quotas from the CSR to organization level to provide accountability for creating great CX.
5 ENHANCED USER INTERFACE	From CSRs to the C-Level, engage employees in providing great CX through a new and improved user interface that is integrated and streamlined for an enhanced user experience.

"The new mySQM database is a completely customizable system that offers versatile reporting and is intuitive to use. We have been very pleased with SQM's responsiveness and level of support during this introduction period."

Jennifer Riggle
Service Delivery Supervisor
VSP Vision Care



**TRY THE mySQM™
CX INSIGHTS DEMO AT
THE CONFERENCE REGISTRATION DESK!**