



# 20<sup>TH</sup> ANNUAL CUSTOMER EXPERIENCE CONFERENCE & INDUSTRY AWARDS

EVENT GUIDE

HISTORIC DAVENPORT HOTEL  
SPOKANE, WA. MAY 7 - 9, 2019

SOM<sup>®</sup> | CX<sup>™</sup>  
RESEARCH,  
CONSULTING,  
AWARDING.



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# LETTER FROM SQM'S PRESIDENT

“ 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! ”



Dear SQM Guest,

Thank you for joining us for SQM's 20<sup>th</sup> Annual Customer Experience Conference and Industry Awards at the Historic Davenport Hotel in Spokane, WA, May 7 – 9, 2019. Since 1998, SQM has brought together hundreds of contact center, customer experience (CX), CRM, and market research leaders for our annual CX conference and industry awards gala. SQM's mission is to help organizations improve their customer and employee experience performance – one individual at a time. We are pleased that year-over-year, SQM's CX conference receives world-class ratings from guests.

SQM's 2019 CX conference will take place across 3 days with 20+ speakers, 400+ guests, proven award-winning CX best practices, and all within an intimate learning setting. Our guests tell us what they like best about attending SQM's CX conference is the information that SQM shares from its ground-breaking CX research as well as the people, process, and technology best practices that have a proven track record of improving CX. SQM's 2019 conference focuses on how a contact center can contribute more towards their organization's CX strategy and performance through best practices to improve CX.

At SQM's CX Industry Awards, we recognize award-winning contact centers and frontline employee performances for 50+ different award categories including Contact Center of the Year, World Class Certification, and CX Best Practices. SQM's CX Industry Awards are the most prestigious and sought-after North American contact center industry awards because it is judged by the customer. Each year, we recognize organizations that have demonstrated excellence in maintaining or improving customer and employee experience performance.

SQM will also recognize the 2018 CSR of the Year and the 2018 Supervisor of the Year at the CX Industry Awards. We believe that CSRs and supervisors are key ingredients for creating world class CX performance. These are the employees that excel at providing great experiences for customers and go the extra mile to resolve customer contacts.

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



## ABOUT SQM GROUP

Improve customer and employee experience performance by conducting CX research, consulting to improve CX, and awarding organizations that have demonstrated CX excellence.

### CX Research

SQM is a leading market research specialist firm for benchmarking, tracking, and improving customer and employee experience, powered by SQM's *mySQM*™ CX Insights software. SQM's CX research service measures, benchmarks, tracks, and identifies opportunities for improving customer contact channel, interaction lifecycle, and employee experience performance. At the heart of SQM's research capabilities is our *mySQM*™ CX Insights software for capturing, analyzing, and reporting customer and employee insights data in one place. Our advanced survey quota management system allows us to accurately deliver a survey quota at a frontline level or any other survey quota that is required. All surveys are conducted from our Coeur d'Alene, Idaho, and Vernon, British Columbia state-of-the-art research centers.

### CX Consulting

SQM's consulting approach is based on the best practices required to improve CX with a proven track record for helping clients improve their CX. SQM's CX consulting service is based on capturing, validating, and sharing best practices required to improve CX. Most importantly, SQM has a proven track record for helping clients improve their CX. SQM can validate if your contact center operating practices are best practices. Our understanding of people, process, and technology best practices for improving CX are unsurpassed in the contact center industry. SQM's consulting services also include CX journey mapping and CX improvement cycle (e.g., identify, develop, check and act) solutions to assist companies in developing and executing a CX improvement plan.

### CX Awarding

SQM's customer and employee experience and best practice awards are the most prestigious and sought-after industry awards in North America. SQM's CX awarding service recognizes organizations that have demonstrated excellence for CX, Employee Experience (EX), and CX Best Practices. Furthermore, SQM certifies organizations and individuals who have demonstrated CX excellence on an ongoing basis. What makes SQM's awards unique is that they are based on customers who have used a contact center and/or employees who work in a contact center. We have more than 50 different awards and recognize top-performing organizations for CX, EX, and CX Best Practice performance.





# CONFERENCE AGENDA

TUESDAY, MAY 7, 2019 - CX BEST PRACTICES CONFERENCE

Time	Location	Details
9:30 AM – 6:00 PM	Hall of Doges	<b>GUEST REGISTRATION</b> SQM's Great CX Advocates will be at registration to welcome you to the event, help you with signing up for tours, and answer any questions on activities at our event.
1:30 PM – 4:30 PM	SQM's VoC Research Center	<b>SQM CALL CENTER TOUR</b> Tour SQM's US corporate headquarters and spend time with us in our state-of-the-art Coeur d'Alene based VoC Research Center.
10:00 AM – 12:00 PM and 2:00 PM – 4:00 PM	Pennington C	<b>mySQM™ CX INSIGHTS DEMONSTRATION</b> <b>Sarah Moffat, VP of Research, and Charlene Hutchison, mySQM Training Manager, SQM Group</b> The new <b>mySQM™</b> CX Insights reporting tool is here. Attend one of two demonstrations on how clients are improving CX with the new <b>mySQM™</b> and speak with SQM's experts on how you can migrate to the new tool.
5:00 PM – 9:00 PM	Isabella Ballroom	<b>NETWORKING AND DINNER</b> Meet with your peers while enjoying the region's finest wines and ingredients for this special dinner networking evening.



# AGENDA OVERVIEW

WEDNESDAY, MAY 8, 2019 – CX BEST PRACTICES CONFERENCE

7:00 AM – 8:30 AM		BREAKFAST BUFFET - MARIE ANTOINETTE BALLROOM & FLOWERFIELD ROOM	
8:30 AM – 9:45 AM	<div>KEYNOTE: THE CX JOURNEY PENNINGTON ABC</div> <div>Mike Desmarais, Founder and CEO of SQM Group</div> <div>Mike will share ground-breaking CX research models for CX journey mapping and provide best practices for an organization when conducting CX journey mapping.</div>		
9:45 AM – 10:15 AM		BREAK - HALL OF DOGES	
10:15 AM – 11:00 AM	EXECUTIVE TRACK ELIZABETHAN BALLROOM		MANAGEMENT TRACK PENNINGTON ABC
	CSR TRAINING Amy Walt, Executive Director for Customer Operations Consumers Energy		CSR RECOGNITION PROGRAM Erica Gugay, Contact Centre Manager FortisBC
11:00 AM – 11:45 AM	CSR CAREER DEVELOPMENT Marilyn Rauch, Customer Service Manager Trisha Duncley, Customer Service Manager Blue Cross and Blue Shield of Alabama		CSR COACHING Michelle Greene, Manager Member Services Blue Cross and Blue Shield Nebraska
11:45 AM – 1:00 PM		LUNCH BUFFET - MARIE ANTOINETTE BALLROOM & FLOWERFIELD ROOM	
1:00 PM – 1:45 PM	CSR RECOGNITION PROGRAM Erica Gugay, Contact Centre Manager FortisBC		CSR TRAINING Amy Walt, Executive Director for Customer Operations Consumers Energy
1:45 PM – 2:30 PM	CSR COACHING Michelle Greene, Manager Member Services Blue Cross and Blue Shield Nebraska		CSR CAREER DEVELOPMENT Marilyn Rauch, Customer Service Manager Trisha Duncley, Customer Service Manager Blue Cross and Blue Shield of Alabama
2:30 PM – 3:00 PM		BREAK - HALL OF DOGES	
3:00 PM – 4:00 PM	<div>KEYNOTE: CONTACT CENTER OF THE YEAR FOR 2018 - GENWORTH PENNINGTON ABC</div> <div>John Jacobs, Director of Service Delivery, and Matthew Braud, Director of LTC Customer Service</div> <div>Find out how this top performing organization provides world class customer and employee experiences and achieved the Contact Center of the Year Award.</div>		
4:30 PM – 5:30 PM	SCAVENGER HUNT NETWORKING Engage your team and meet world class performing industry peers while discovering Spokane by participating in a scavenger hunt!		
6:00 PM – 9:00 PM	<div>PROHIBITION THEMED NIGHT MARIE ANTOINETTE BALLROOM &amp; FLOWERFIELD ROOM</div> <div>Step into the 1920s with dinner and dancing to the highly acclaimed electro swing sounds of GoodCo., where vintage swing meets modern beats.</div>		





# AGENDA OVERVIEW

THURSDAY, MAY 9, 2019 - CX BEST PRACTICES CONFERENCE

7:30 AM – 9:00 AM	BREAKFAST BUFFET - MARIE ANTOINETTE BALLROOM & FLOWERFIELD ROOM	
9:00 AM – 10:00 AM	<b>KEYNOTE: VENDOR PERFORMANCE MANAGEMENT</b> <b>PENNINGTON ABC</b> <b>Anne Palmerine, VP Customer Engagement, Enrollment &amp; Retail, UPMC Health Plan</b> Learn from this 2018 award-winning organization the best practices for managing relationships with vendor partners and leveraging customer experience for performance accountability.	
10:00 AM – 10:30 AM	BREAK - HALL OF DOGES	
10:30 AM – 11:15 AM	<b>EXECUTIVE TRACK</b> <b>ELIZABETHAN BALLROOM</b>  <b>DESKTOP APPLICATIONS</b> Elisa Rios, AVP, Customer Operations Support Mr. Cooper	<b>MANAGEMENT TRACK</b> <b>PENNINGTON ABC</b>  <b>CONTINUOUS IMPROVEMENT</b> Kirk Rutter, Operations Reporting & Performance Analyst Jackie Heaven-Ah Hi, Assistant Director of Customer Service Regence Blue Cross Blue Shield Plans
	<b>STANDARD OPERATING PROCEDURES</b> Tracy Dietel, Senior Business Analyst Blue Cross Blue Shield of Massachusetts	<b>CALL HANDLING</b> Mindy Rubio, Director, Operations Blue Cross Blue Shield of Kansas City
12:00 PM – 1:00 PM	LUNCH BUFFET - MARIE ANTOINETTE BALLROOM & FLOWERFIELD ROOM	
1:00 PM – 1:45 PM	<b>CONTINUOUS IMPROVEMENT</b> Kirk Rutter, Operations Reporting & Performance Analyst Jackie Heaven-Ah Hi, Assistant Director of Customer Service Regence Blue Cross Blue Shield Plans	<b>DESKTOP APPLICATIONS</b> Elisa Rios, AVP, Customer Operations Support Mr. Cooper
1:45 PM – 2:15 PM	BREAK - HALL OF DOGES	
2:15 PM – 3:00 PM	<b>CALL HANDLING</b> Mindy Rubio, Director, Operations Blue Cross Blue Shield of Kansas City	<b>STANDARD OPERATING PROCEDURES</b> Tracy Dietel, Senior Business Analyst Blue Cross Blue Shield of Massachusetts

## AWARDS CEREMONY GALA

5:00 PM – 6:00 PM	<b>WINE RECEPTION - HALL OF DOGES</b> Relax, unwind, and mingle with your industry peers while enjoying a wine and spirits tasting before the gala awards dinner event.
6:00 PM – 9:00 PM	<b>CX INDUSTRY AWARDS AND GALA DINNER - PENNINGTON ABC</b> SQM's 20 <sup>th</sup> Annual CX Industry Awards Gala celebrating world class performing organizations and individuals who provide great CX as judged by the customers they serve and employees who work in the contact center.
9:00 PM – 12:00 AM	<b>CASINO ROYALE EXPERIENCE - MARIE ANTOINETTE BALLROOM</b> Spin the Roulette wheel, try your hand at Texas Hold 'em, and place your bets on having a jackpot experience with your team and peers!
	<b>DJ NIGHTCLUB EXPERIENCE - EARLY BIRD ROOM</b> Enjoy creative beats and tracks with DJ Mykro Douglas spinning tunes for your dancing pleasure until midnight.
	<b>INTIMATE ACOUSTIC EXPERIENCE - PEACOCK LOUNGE</b> Savor an intimate live performance in the breathtaking 5,000-piece stained-glass ceiling Peacock Room with KÖSH who has shared the stage with international acts including Kid Rock, Bret Michaels, and Metallica.



## 20<sup>TH</sup> ANNUAL CUSTOMER EXPERIENCE INDUSTRY AWARDS

SQM is pleased to announce our 2018 award-winning contact centers and frontline employees. SQM awards organizations that have delivered customer experience (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. SQM has recognized top performing organizations for CX since 1998.

On an annual basis, SQM conducts over 1.5 million surveys with customers who have used contact channels such as a call center, email, website, IVR, chat, or retail site. SQM also conducts over 25,000 employee experience (EX) surveys annually with employees who work in contact centers.

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

both quantitative questions and follow-up qualitative questions that can be used to help organizations improve their contact channels' customer experience. Benchmarking studies were conducted during the period of January 1, 2018 to December 31, 2018.

SQM recognizes organizations 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.

SQM also recognizes 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 announce one as the 2018 CSR of the Year. In addition, we 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 announce one as the 2018 Supervisor of the Year.



# AWARD WINNERS & FINALISTS LISTING

## CONTACT CENTER OF THE YEAR AWARD

	Organization:	Criteria:
<b>Winner:</b>	Genworth	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.
<b>Finalists:</b>	Jackson	
	VSP Vision Care	

## BEST PERFORMING SMALL- TO MID-SIZED CONTACT CENTER AWARD

	Organization:	Criteria:
<b>Winner:</b>	World Vision Canada	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.
<b>Finalists:</b>	Blue Cross and Blue Shield Nebraska	
	Marchon/Altair	

## CONTACT CENTER WORLD CLASS CX CERTIFICATION

407 ETR (Contact Centre/Commercial)	Jackson
Blue Cross and Blue Shield Nebraska	Marchon/Altair
Blue Cross and Blue Shield of Alabama (Federal Employee Program)	Millennium1 Solutions (Credit Card Sales Segment)
Blue Cross and Blue Shield of Kansas	Millennium1 Solutions (ATCOenergy)
Blue Cross Blue Shield of Massachusetts Partner Express Scripts International	Mr. Cooper - Assurant
Blue Cross Blue Shield of Massachusetts (Retail Sales and Retention)	Regence BlueCross BlueShield (BlueCross BlueShield of Oregon)
BlueCross BlueShield of Vermont	Regence BlueCross BlueShield (BlueShield of Idaho)
Canadian Tire Financial Services (CRCC)	Scotiabank Global Business Payments- Client Services & Solutions Helpdesk
Florida Blue (Federal Employee Program)	Security Health Plan
FortisBC	VSP Vision Care (California)
Genworth Long Term Care Customer Service	VSP Vision Care (Ohio)
Highmark (Federal Employee Program)	World Vision Canada
<b>Criteria:</b> 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	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	Canadian Tire Financial Services
Web Self-Service	Security Health Plan
Emerging Channels	BlueCross BlueShield of North Carolina
Quality Assurance Program	Genworth
Desktop Application(s)	Mr. Cooper
CSR Recognition Program	FortisBC
Career Development Program	Blue Cross and Blue Shield of Alabama
Call Handling Practice	Blue Cross Blue Shield of Kansas City
Escalation CSR Support	EA Worldwide Customer Experience
Performance Management System (CSR)	BlueCross BlueShield of South Carolina
Performance Management System (Vendor)	UPMC Health Plan
CSR Coaching Program	Consumers Energy (Tie) Blue Cross and Blue Shield Nebraska (Tie)
CSR Training Program	Consumers Energy
CSR Selection Process	Blue Cross Blue Shield of Massachusetts
Standard Operating Procedures	Blue Cross Blue Shield of Massachusetts
Continuous Improvement Process	Regence Blue Cross Blue Shield Plans
<b>Criteria:</b> 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

## 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	
Pharmacy	HealthNow New York Inc.	
Retail/Service	Petro-Canada (Concentrix)	
Energy	FortisBC	
Telco/TV	Telus Quebec	
Helpdesk	Blue Cross Blue Shield of Michigan (Web Support Help Desk)	
Business to Business	Marchon/Altair (Tie) VSP Vision Care (Tie)	

### 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	Marchon/Altair	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.

# AWARD WINNERS & FINALISTS LISTING

## CSR FINALISTS FOR CSR OF THE YEAR

Name:	Organization:	Criteria:
John Kolath	Blue Cross and Blue Shield of Minnesota	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.
Eric Ashby	Blue Cross Blue Shield of Kansas City	
Trish Smith	Blue Cross Blue Shield of Kansas City	
Charles Sanders	BlueCross BlueShield of North Carolina	
Carmen Storey	BlueCross BlueShield of South Carolina	
Lapriel Williams	BlueCross BlueShield of South Carolina	
Abigail Fifield	BlueCross BlueShield of Vermont	
Cerridwen Moser-Bertsche	BlueCross BlueShield of Vermont	
Jennie Shangraw	BlueCross BlueShield of Vermont	
Rebecca Lee	BlueCross BlueShield of Vermont	
Katrina Lloyd	Consumers Energy	
Rebecca Newman	Consumers Energy	
Toni Fox	Consumers Energy	
Allistair Cockrell	FedEx Express Canada	
Jasmine Austin	Florida Blue	
Robert Mills	Horizon BCBSNJ	
Hailey Steele	Marchon/Altair	
Juliana Klingel	Marchon/Altair	
Brittany Pitts	Premiera Blue Cross	
Shandra Roberts	Premiera Blue Cross	
Hannah Morphis	Regence Blue Cross Blue Shield Plans	
Karla Bare	Regence Blue Cross Blue Shield Plans	
Kelly Carpenter	Regence Blue Cross Blue Shield Plans	
Jafar Abbas	Scotia iTRADE	
Nic Carter	Name Withheld	



# AWARD WINNERS & FINALISTS LISTING

## SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

Name:	Organization:	Criteria:
Drew Shirack	Blue Cross and Blue Shield of Kansas	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.
Kathy Cordonnier	Blue Cross Blue Shield of Kansas City	
Brenda Parker	Consumers Energy	
Bridget Gaitan	Name Withheld	
Anda Imper	Premiera Blue Cross	
Katie Johansson	Security Health Plan	

## CSR TOP WORLD CLASS CX IMPROVEMENT WINNERS

Name:	Organization:	Criteria:
Syreeta Branch	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.
Debra Knight	Consumers Energy	
Patricia Newman	Genworth	
Steven Weber	Regence Blue Cross Blue Shield Plans	
Christina Billue	VSP Vision Care	

## CUSTOMER EXPERIENCE AWARDS

### First Call Resolution Improvement Awards

AmeriHealth Caritas Member Services	Excellus BlueCross BlueShield (Federal Employee Program)
Blue Cross and Blue Shield Nebraska	FedEx Express Canada
Blue Cross and Blue Shield Nebraska (Federal Employee Program)	Geisinger Health Plan
Blue Cross Blue Shield of Kansas City	HCL
Blue Cross and Blue Shield of Minnesota	Mr. Cooper- Assurant
Blue Cross and Blue Shield of Minnesota (Federal Employee Program)	Mr. Cooper (Default)
BlueCross BlueShield of Montana (Federal Employee Program)	LoyaltyOne
BlueCross BlueShield of Oklahoma	Wellmark Blue Cross and Blue Shield of Iowa
ConnectiCare	

**Criteria:** Based on a 5% or greater annual FCR improvement from the previous year.



# AWARD WINNERS & FINALISTS LISTING

## EMPLOYEE EXPERIENCE AWARDS

### Highest Employee Experience for the Contact Center Industry Award

Organization:	Criteria:
Genworth	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:
Marchon/Altair	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	Genworth	
Health Care	Blue Cross and Blue Shield Nebraska	

### Highest Work From Home Employee Experience

Organization:	Criteria:
Jackson	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:
Blue Cross and Blue Shield of Kansas	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.
Blue Cross and Blue Shield Nebraska	
BlueCross BlueShield of Vermont	
Canadian Tire Financial Services	
Genworth	
Highmark (Federal Employee Program)	
Jackson	
Regence Blue Cross Blue Shield Plans	
VSP Vision Care	
World Vision Canada	





# 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](https://fonolo.com) or call 1.855.366.2500



# CUSTOMER EXPERIENCE CONFERENCE SPEAKERS



**MIKE DESMARAIS**  
Founder and Chief Executive Officer  
SQM Group

Mike Desmarais is the Founder and Chief Executive Officer of SQM Group. Mike is currently an MBA Candidate at Athabasca University. 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, and VSP Vision Care. In addition, Mike is a popular contact center industry thought-leader with over 20,000 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.



## **DANI KUNTZ**

Senior Manager of Client Advocacy  
**SQM Group**

Dani Kuntz, is a Senior Manager of Client Advocacy with SQM Group. She has a Certificate in Business Management from BCIT, and is a member of the Canadian Internet Marketing Association. She has over 15 years of management and customer service experience, which includes 5 years of business development and marketing experience. Dani developed corporate social media strategies, PPC advertising, and content marketing at SQM prior to moving into her current role. Dani joined SQM Group in October of 2016.



## **NADER GHATTAS**

Vice President of Consulting  
**SQM Group**

Nader Ghattas, BMgmt, is the Vice President of Consulting with SQM Group. Nader brings over a decade of consulting, corporate asset direction and extensive international business experience to SQM and is currently an MBA candidate. He has an honours degree in business management and started his career as a TSR at SQM, moving 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 joined SQM Group in 2012.



## **PAM HAVENS**

Senior Manager of Client Advocacy  
**SQM Group**

Pam Havens, BBA, is a Senior Manager of Client Advocacy with SQM Group. She has her bachelor's degree in Business Administration, Marketing concentration, from the University of Washington. She has been with SQM since January of 2013 and helped open the SQM Coeur d'Alene contact center as the center manager before moving to an account management role. Pam has over 25 years of experience in retail and contact center management and has a passion for helping others to improve the customer experience.



# CONFERENCE SPEAKERS



## **AMY WALT**

Executive Director for Customer Operations  
**Consumers Energy**

Amy Walt is the Executive Director of Customer Operations for Consumers Energy. She has been in the utility business for 25 years and joined the Consumers Energy team in July of 2014.

Amy has overall responsibility for the company's customer-facing operations including; Contact Centers, Digital Operations, Meter to Cash processes and Low Income Programs. Since joining Customer Operations in 2014, Amy has championed the voice of the customer, driving a customer centric culture across the organization. In addition, Amy has a keen focus on fostering cultural change for all customer-facing employees, resulting in high engagement and delivery of extraordinary results for customers and the financial position of the company.



## **ANNE PALMERINE**

Vice President Customer Engagement, Enrollment & Retail  
**UPMC Health Plan**

Anne has led UPMC Health Plan in Customer Service for the past sixteen years, including Enrollment and Retail. Accomplishments have included implementation of a highly esteemed Health Care Concierge program, implementation of a myriad call center applications, driving first call resolution and service recovery, integration of an omnichannel experience, and achieving JD Power Call Center Certification in 2009, 2011, 2012, 2014, 2016 and 2018. Achievements have included from JD Power highest in Member Satisfaction for PA Region for three consecutive years, from ICMI, Best Strategic Value to our Organization and Best Contact Center Culture, from Stevies, Best Use of Technology, and from IQPC, Best in Class Contact Center (Over 200 Seats). Anne has managed in customer service call centers for the past 26 years with a focus on fostering a strong culture, customer retention, growth, and sales.

# CONFERENCE SPEAKERS



## **ELISA RIOS**

Assistant Vice President Customer Operations Support  
**Mr. Cooper**

Elisa Rios is the Assistant Vice President of Customer Operations Support at Mr. Cooper. She joined Mr. Cooper in October of 2017 and has been in the mortgage servicing industry for 20 years. She manages the Knowledge Management Team, Coaching Program, and oversees the SQM relationship to ensure the business has a direct pulse on their customers. In her career, she has remained skilled in the career development of others, improvement of employee / business performance, identifying and analyzing operational needs and she proactively seeks ways to improve efficiency and productivity. She is passionate about supporting the business and developing a culture where training, coaching, communication and knowledge is the keystone to success.



## **ERICA GUGAY**

Contact Centre Manager  
**FortisBC**

Erica Gugay is a Contact Centre Manager for FortisBC, a utilities company in British Columbia, Canada. She has been in the customer service business for over 10 years and originally joined FortisBC in 2011 as part of the initiative to bring customer service back in-house. Erica re-joined the team in 2016 as Contact Centre Manager. Prior to joining FortisBC Erica has held a number of management positions including, training, quality, process support, and human resources. Erica is an advocate for employee growth and the customer experience. In her recent role as Contact Centre Manager, Erica has worked on developing a streamlined onboarding process, development program for customer service leaders and employee engagement events.



## **JACKIE HEAVEN-AH HI**

Assistant Director of Customer Service  
**Regence Blue Cross Blue Shield Plans**

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. Her work focuses on ensuring that her teams put the customer first, working with empathy and efficiency to resolve their issues quickly. She carries the perspective of customers into the larger organization as she collaborates with a wide spectrum of departments – from sales and marketing to claims and provider services – in their work. 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.

# CONFERENCE SPEAKERS



**JOHN JACOBS**  
Director of Service Delivery  
Genworth

John Jacobs is the Director of Service Delivery for Genworth and is approaching his eighth year with the company. Since joining Genworth, John has held roles in project management, application development and operations. In his current capacity John oversees, workforce management, call center metrics and reporting, call and transaction quality and a process improvement project team. Prior to joining Genworth John held operations roles with a variety of companies and served as an infantry officer in the United States Marine Corps.



**KIRK RUTTER**  
Operations Reporting and Performance Analyst  
Regence Blue Cross Blue Shield Plans

Kirk Rutter is an Operations Reporting and Performance Analyst at Cambia Health Solutions who primarily focuses on finding and eliminating pain points within Customer Service. He has helped create and maintain the Pain Points Program, which focuses on continuous improvement in Health Plan Operations. Kirk began working at Cambia in 2014 as a Customer Service Representative and spent two years as a Customer Service Trainer before taking on his current role.

Kirk uses his customer service and training experience, as well as his training in lean problem solving, to partner with customer service employees to solve problems on behalf of members, improve existing processes, and create new processes to improve customer satisfaction. He also helps train and develop employees to become effective in continuous improvement.



**MARILYN RAUCH**  
Customer Service Manager, Specialist Resource Line  
Blue Cross and Blue Shield of Alabama

Marilyn Rauch grew up in Michigan, lived in California and now makes her home in the Birmingham, Alabama area. She has a Bachelor's degree from the University of Alabama and has been with Blue Cross and Blue Shield of Alabama for nineteen years. In addition to her extensive prior customer service experience, Marilyn served as a team leader in both the member and provider calls centers before joining the customer service training team as a facilitator. She transitioned to Performance and Talent Management where she was responsible for professional and management development and performance management. Marilyn's background in a variety of customer service settings and roles, along with her professional and leadership development experience has effectively equipped her to manage the Specialist Resource Line support team while growing our next leaders.



# CONFERENCE SPEAKERS



## **MATTHEW BRAUD**

Senior Manager in Long Term Care Customer Service  
**Genworth**

Matthew Braud is a Senior Manager in Long Term Care Customer Service. He joined Genworth in 2014 as a Project Manager working closely with the Long Term Care business and was promoted to his current role in 2016 where he oversees transaction and rate action phone teams. Matthew has held various project management roles throughout his career and has served in leadership positions

with several community organizations.



## **MICHELLE GREENE**

Manager Member Services  
**Blue Cross and Blue Shield Nebraska**

Michelle Greene is the Continuous Improvement Manager at Blue Cross and Blue Shield Nebraska, she has a strong background in customer experience and leadership development gained across healthcare and insurance industries. With over 30+ years' experience in hiring, coaching and customer relationship management Michelle is passionate about improving the customer experience through enhanced coaching

and leadership development. When she isn't working, Michelle finds balance through solo traveling, reading and spending time playing with her granddaughter "Noodle."



## **MINDY RUBIO**

Director, Operations  
**Blue Cross Blue Shield of Kansas City**

Mindy Rubio is Director of Contact Center Operations at Blue Cross Blue Shield of Kansas City (BlueKC). She has been a part of the organization for more than 15 years, contributing to vital Operation roles, including front line customer support. Mindy has a passion for delivering a positive customer experience not only to external customers, but internal customers and staff as well. She has spent her career focused

on customer service, identifying and implementing innovative processes to promote a customer focused culture, supporting and empowering her team to deliver quality service, and encouraging feedback while challenging her peers to consider new ideas. She advocates for the customer and helps the organization keep thoughts of customer experience at the forefront.

# CONFERENCE SPEAKERS



**TRACY DIETEL**  
Senior Business Analyst  
Blue Cross Blue Shield of Massachusetts

Tracy Dietel was born and raised on the South Shore of Massachusetts and still resides there today. She has been with Blue Cross Blue Shield of Massachusetts for seventeen years. Tracy has held various roles throughout her career including member service, research, quality assurance, process improvement, and analytics. Tracy's extensive background gives her unique perspective on transforming the member experience.

She is also trained as a Design Thinking Catalyst which provides her with a broader skill set to train individuals to use a human centered design approach to continuous improvement initiatives.

Tracy's work focuses on collaborating across the organization – from sales, to enrollment, to claims – to ensure we are providing a personal, professional and efficient experience for our members on each contact. She is passionate about her work and seen as a trusted advisor who uses her analytical skill set to make effective and meaningful recommendations to continually improve the member's experience.



**TRISHA DUNCKLEY**  
Customer Service Manager, Quality  
Blue Cross and Blue Shield of Alabama

Trisha Dunckley was born and raised in Birmingham, Alabama and holds a Bachelor's degree from Samford University. She has been with Blue Cross and Blue Shield of Alabama for twenty-nine years in roles serving the private sector as well as Medicare. Eighteen of these years have been in Customer Service. Trisha's experience has given her a solid foundation in call center fundamentals, including day-to-day operations,

emerging technologies, and best practices of quality assurance standards. In her current role as Quality Manager, Trisha is responsible for setting the quality standard for all customer interaction interfaces including; inbound calls, email, chat and written correspondence.

**CONTACT CENTER  
OF THE YEAR**

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**BEST PERFORMING  
SMALL- TO MID-SIZED  
CONTACT CENTER**

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**GREAT CX STORIES**





# CONTACT CENTER OF THE YEAR



Genworth Financial, Inc. is a leading insurance holding company committed to helping families achieve the dream of home ownership and address the financial challenges of aging through its leadership positions in mortgage insurance and long term care insurance. Headquartered in Richmond, Virginia, Genworth traces its roots back to 1871.

Genworth's strength is our people. They understand the issues families face because they face them too. They're all someone's son or daughter, mother or father, neighbor or friend. They share the same dream of homeownership and the same challenges of aging and caregiving for the people they love. They understand how important these issues are and how much they matter, and that's why they come to work every day. Our people are empowered by their leaders, satisfied in their work, and excited about the company's future.

## **Streamlined Systems**

As a result of a number of acquisitions over its history, Genworth offers over 125 individual product types serviced through six core administration systems and more than 20 ancillary systems. While we are proud of our legacy of walking with families through the challenges of aging, we were troubled to find that our customer service representatives (CSRs) often needed to use ten or more applications to service a single call. The delays caused by the need to navigate these systems frustrated CSRs and customers alike. To improve our service, we began the process of consolidating applications, and we have seen our average hold times decrease and employee satisfaction increase. Our ultimate goal is a unified desktop: a single source of truth where CSRs can perform 80% of their functions. Our commitment to our employees' satisfaction and an outstanding customer experience is evident in our effort to provide a smooth, efficient system that will allow us to serve our customers even more effectively.

## **Employee Empowerment**

We have empowered our employees to provide an exceptional customer experience by shifting from a metrics focus to a people focus. Instead of prioritizing abandon rates, we set a more customer-friendly objective to answer each call within the Service Level Agreements we have set, typically between 60 and 90 seconds after a caller proceeds through the interactive voice router. Rather than emphasizing adherence to metrics, we concentrate our efforts on coaching our CSRs to build rapport to optimize customer satisfaction. We've reduced the size of our teams to allow managers more time to invest in individual coaching. Our CSRs are free and empowered to do what it takes to ensure the customer is satisfied at the end of the call.

## **Employee Satisfaction**

We believe that happy employees create happy customers. Our associates know their value as the foundation of the company's success. We ensure every voice is heard through one-on-one meetings between associates and their manager, senior manager, and director throughout the year. We express our appreciation for their service through varied employee recognition programs, team-building events, and engagement activities. In addition to generous choice time off and family leave policies, associates are given 40 hours of paid leave per year to invest in the community causes they are most passionate about through volunteer work. The evidence is in the numbers: 73% of Genworth customer service representatives are very satisfied in their work, 15% more than the average world-class call center.

Genworth's people-first mindset and future focus allow us to deliver a world-class experience to the families we care so deeply about. Our associates are trusted allies for everyone who needs care as they age and those who love them.

# BEST PERFORMING SMALL- TO MID-SIZED CONTACT CENTER



World Vision Canada (WVC) has been transforming the lives of children and their communities for over 65 years. We're a global relief, development and advocacy organization empowering children, families and their communities to overcome poverty and injustice.

WVC's Customer Care team is dedicated to building and cultivating a team that continually thrives to exceed customer expectations and to deliver world-class front-line support and expertise. We build experiences and customer relationships that are centric to how the customer chooses to interact. Through these engagements we aim to instill trust and loyalty in the organization and its brand, and at times the last line of defense in the experience when a supporter decides to leave.

Our contact center has an agent base of 75-85 CSRs that manage communication channels through phone (inbound and outbound), email, chat, social media, and manual correspondence. Dominant channel is phone, however, over the past few years have seen a growing trend towards digital interactions through email, chat and social media for customer service support. Developing customer centric engagement through non-personal channels has forced us to look at how we were performing against the contact center universe and where there are opportunities for improvement. Which started our journey towards a stronger focus on voice of the customer from a contact center lens.

August 2017 WVC partnered with SQM to build the voice of the customer perspective into our daily workforce management, objectives and quality and monitoring. Our first level of engagement was with the annual benchmarking study, where our eyes were opened to the possibilities of incorporating the customer voice into our operations not just as a contact center but as an organization. Then in June 2018 we went live with agent level tracking and a revamp to our QA program. These past 18 months have been transformational to our team, shifting us from making decisions based

solely on operational SLAs and metrics and subjective performance monitoring, to now incorporating, measuring and responding to the customer voice and experience KPIs.

With the incorporation of agent level tracking, came a shift away from our traditional soft skills training and monitoring program. WVC has developed and launched a new soft skills program that incorporates the 4 pillars of SQM into the broader materials – Understand Me, Care About Me, Help Me and Resolve Me. The concepts themselves were not new to us, but the intentionality of shifting our monitoring and coaching from a check list approach, to a model that listens to the conversation against these pillars has been revolutionary for our team. Agent acceptance to this program has been exceptional and they are eager to incorporate the delivery model into their conversations.

This change has also shifted how we conduct call coaching and monitoring. Prior to the implementation of agent level tracking, Team Leaders randomly selected calls to monitor. The monitoring was very subjective, and points based. Engagement with the agents happened a couple times a month and very report focused conversations. Now, CSRs are embracing the conversations and narrowing in on key skills to refine and can see immediate results on future call surveys. This has enabled an acceptance culture towards our QA program.

Our transition to being customer experience orientated and managing and monitoring the KPIs has been rolled out end-to-end. All teams own the results and all teams are seeing their role in improving overall performance. Moving away from monitoring productivity based on traditional contact center SLAs, to pivoting and listening to the voice of the customer and incorporating the KPIs into strategic decisions. We are still in the growth stage of this new module, but early results and successes have enabled us to see the possibilities of where this can go.

# GREAT CX STORIES

Allistair Cockrell  
FEDEX EXPRESS CANADA

## A TIME OF CHANGE

In addition to his CSR role, Allistair participates in the training of our new hires and works as a peer coach. He truly exemplifies our approach to providing outstanding quality service and resolution for our customers. He is well regarded by all employees in the contact center and brings a positive attitude and big smile to work each day. Although many of his interactions are not face to face, I know our customers can always feel his always joyful spirit through the phone.

Allistair received a call one day where a customer was inquiring on why they received an invoice which is a common inquiry. Customers receive international packages and customs charges may be assessed after the package is received, which results in an invoice being mailed to the customer. The customer explained the invoice was overdue as she had recently moved and had it packed up. The customer went on to advise Allistair that her mother recently had a fall and was being moved into a care home, which is why she hadn't been able to inquire regarding the invoice. She included details that her parents had lived in this home for many years, it was a home they had built together and that her father had recently passed away. Before getting into details about the invoice, Allistair immediately recognized and responded to her with extreme empathy, noting this sounded like a very significant time of change for the family.

Allistair was able to explain the reason the invoice was received and explained the charges in detail. The customer said that she would settle the invoice but could not pay the entire amount at once and wasn't aware when the package was sent that there could be additional fees assessed. Allistair was quick to respond that he would like to see what he could do to help the customer given the situation she had described. In this case, some of the charges were assessed by Canada Customs and could not be waived, but he saw the opportunity to provide a one-time waiver of the FedEx fees to help the customer. The customer expressed

how extremely grateful she was and began to cry. She told Allistair how wonderful he was, and he responded humbly in saying it was the least he could do. While he was processing the credit, he continued a conversation with the customer in which they both shared some family history and connected with each other. The customer expressed that she couldn't believe how kind Allistair was and that it was so helpful to her current situation. The call ended with a customer who left very appreciative and a representative who was satisfied with the empowerment they had to truly help.

Allistair received internal recognition for this call where outstanding calls are nominated nationally and then a winner is selected by the Vice President of Customer Experience. We were so proud that his skills were showcased to our Executive Team and that he was chosen as the winner. This call was shared with other employees to demonstrate how a small gesture of goodwill, coupled with taking the time to truly listen and make them feel valued which can make a world of change when it comes to providing an outstanding and memorable experience.





# GREAT CX STORIES

**Katrina Lloyd**

CONSUMERS ENERGY

## IT'S ABOUT MORE THAN JUST THE NUMBERS

With less than three years of experience in her Customer Service role at Consumers Energy, Katrina has proven that she truly understands how to compassionately relate to her customers under any circumstances with which they are dealing. Katrina is quick to recognize when a customer needs empathy and compassion, leading to numerous expressions of gratitude being shared with me by her customers. I've even had customers call back after having completed their call with Katrina simply to express to me how thankful they were with how she handled their call. Here's an example of one such call from Katrina's recollection.

We often receive calls from customers regarding the accounts of their loved ones who have passed away. These callers are often in a delicate, emotional state, and it is imperative that we handle their calls with a great deal of respect. One day, I received a call from a woman who had lost her mother unexpectedly. The call was additionally emotional for the caller as she had lived with her mother. She shared with me several concerns about the process of transferring her service as she had poor experiences with other providers before calling Consumers Energy. Having recently suffered the loss of a parent, I was able to provide her additional information, as well, regarding working with the courts and allocating death certificates to all the necessary entities. The caller stated she had never spoken to a representative who genuinely cared about what was happening in her life and wasn't in a hurry to get her off the phone. Through our conversation, I shared with her the loss of my father, and I could tell the customer just needed someone to care about what she was experiencing. I was able to make the transition of service effortless for the customer. She was a manager for over 30 years in the medical field, and at the end of the call, she shared with my supervisor that I was an asset to the company, and Consumers Energy needed to know it!

Katrina consistently arrives to work with a smile on her face and a twinkle in her eye, which comes across in her calls. Customers are quick to recognize that they have someone on the line who really cares about serving them. An example of Katrina's customer care is shared through this contact:

I received a call from a customer who was very distraught due to not being able to make a payment through our automated phone system. The customer was blind, and not able to enter the necessary information to initiate his payment. When he reached my line, he had been stuck in the automated phone system for approximately thirty minutes and had already spoken to a number of other representatives. By the time I answered his call he felt defeated and asked with tears in his voice, "What is someone like me supposed to do to make a phone payment at Consumers Energy?" He asked why we didn't care about people like him. I apologized empathetically to him about his experience and explained to him that Consumers Energy does care about all our customers and that we are making strides to improve the customer's experience whenever they reach out to us. I made him aware that we would soon be adding voice options to our IVR for our customers. The customer began to understand that I was willing to make sure he got what he needed and that I was more than willing to help him. I was able to contact a payment agent to process his payment over the phone without having to use the automated system. The time it took to help this gentleman was well worth it. It not only preserved his diminished confidence and loyalty in Consumers Energy, it proved to him that people care at Consumers Energy. Our company is more than a name, but we are made of thousands of men and women who not only talk about taking care of our customers but do it. The customer told me that he could tell I was a very caring person who loves what I do sincerely.

# GREAT CX STORIES

Robert Mills  
HORIZON BCBSNJ

## REMINDING THE MEMBER THAT THE COMPANY CARES

Sometimes the difference in a customer's interaction with their insurer, boils down to getting an agent like Rob. He has demonstrated what it means to help our members and take them out of the middle of the 'insurance process'. As a result of Rob's conversational approach on calls and his effectiveness helping our members, he's since become a part of our Concierge team. This is a team that helps key members with a 'white glove' approach.

In any given day, Rob and most agents will field between 25 - 35 phone calls. The topics can vary, and the help provided isn't always a compelling story. Sometimes, however, a member calls in that really needs our help, and it's what we do during those moments that define us. The call that really exemplified what service should look like, is a call from a member who was looking for help sorting out multiple bills he had been receiving. Normally, this would be routine, but in this case, it took on a whole new life, as Rob assisted the member navigating his services and reaching out to various providers to sort out the bills he had been receiving.

What made this call different, was the member had recently undergone throat surgery and was in the recovery phase. He couldn't speak at his normal volume, but needed help working through the claims he had been trying to keep track of and help understanding his benefits as it related to everything he was going through. The task was difficult for our member as he struggled to speak but needed help. Rob understood what the member needed and made sure to help him sort out every part of the member's concerns. As part of sorting everything out, Rob began calling the providers, and making sure the providers were accurately assessing liability for the services they had provided.

The call lasted approximately 2.5 hours, during which time, many agents that Rob conferenced in to help our member were less patient, and often not as empathetic

towards our member. Rob intervened multiple times to alleviate any need for the member to explain anything and focus the calls with the helping agents to fully resolve the questions on the bills and claims.

When the call was complete, Rob had helped the member work out the 4 months of stress that followed their procedure, as well as understand all that might have been billed. He was able to connect with multiple providers, give clarity to the member and providers, and lastly, helped sort out a delayed prescription that was waiting on an authorization.

Below is that testimonial, sent directly to the CEO of Horizon BCBS:

*I would be remiss if I didn't apprise you of an experience I had with one of Horizon-BCBSNJ customer service representatives. His name is Robert Mills. I'm a senior (I prefer seener) customer and had some issues with my account. Additionally, I had recent vocal cord surgery and it sometimes has made it difficult to be understood on the telephone. Robert was very knowledgeable with what I had to discuss, quite personable, most engaging, and very, very polite. But what was most important to me was that he treated me most kindly and patiently due to my difficult ability to speak with this new voice I had inherited. There is no doubt in my mind that Robert was raised well by his family and trained well by your company. Robert makes an excellent ambassador for Horizon-BCBSNJ. I applaud you and the company for having the foresight in hiring Robert and the good fortune in being able to retain him.*

# GREAT CX STORIES

Jafar Abbas  
SCOTIA iTRADE

## THEY WANTED INDEPENDENCE

As a member of Scotia iTRADE's High Net Worth Desk, there are high expectations for providing a memorable client experience. We provide white-glove service to our most highly active and affluent clients when it comes to servicing their accounts. As many in the customer service industry know, it is hard to earn a client's trust yet very easy to lose it. Therefore, it is important to focus on showing empathy and patience, understanding the client's needs, and making difficult concepts easy to understand.

One morning I received a call from a new client who had called in and requested to transfer out their assets and close their accounts. This is not the ideal beginning to a conversation and as such, deeper probing had to be done to find the root of the issue. I informed them that I would be able to assist them with their request but also asked why they wanted to close their accounts. The client stated they were overwhelmed by self directed investing as they were not familiar with trading on their own and using the tools we had available. They felt that they had made a mistake. I probed further and asked what their original intention was when they decided to open an account. They stated that they had previously been with an advisor and were not getting the advice they needed, and as well, they wanted independence in making their own investment decisions. I now had a better understanding of why the client was calling. Through my years of experience in the financial industry, I have come across many clients who wanted to experience the joy of taking control of their own finances but needed a bit of guidance to set them in the right direction to financial independence. Furthermore, I could relate to them as I also was in their place several years ago, overwhelmed by the prospect of managing my own investments and making sure I had the tools and knowledge available to make sound investment decisions. I made a connection with the client by sharing my personal experience with them. I told them that I would like to see their original intentions come to fruition and that if they spent a

few moments of their time with me, that I would help improve their confidence. At Scotia iTRADE we believe that knowledge is key to becoming a confident investor which is why we have the Scotia iTRADE® U program. It is the educational section of our website where our clients have access to a vast range of free educational tools and resources. I walked the client through the various articles, modules, and webinars to help them build their own investment strategy. The client was pleasantly surprised at the amount of easy-to-use tools and guides. By the end of the conversation, the client decided that they had originally made the right decision in coming to us. They were quite pleased that I took the time to help bring them peace of mind and boost their confidence.

The importance of providing great client experience cannot be emphasized enough. Great customer experience is a revenue driver while poor customer experience is a cost driver. Clients who are pleased with the service they're receiving will recommend our brokerage to their friends and family. I have experienced that firsthand. Furthermore, the high level of service and call resolutions will incentivize them to maintain and grow their business with us. This is one of the main reasons as to how I have been able to earn my clients' business and achieve 215% of my annual sales target.



# GREAT CX STORIES

Hailey Steele  
MARCHON/ALTAIR

## REWARDS OF GOING THE EXTRA MILE

Hailey Steele recently converted from a consumer facing role to a B2B role within Marchon/Altair. A recent customer interaction has shown her the personal and professional rewards of going the extra mile. For Hailey, it was a revelation that interacting with a doctor's office, instead of directly with the end patient, can end with an exceptional and sometimes life-changing experience for the patient. In the grip of the day-to-day it is easy to forget that what we do matters, and moments of exceptional customer service like this bring everything back into crystal clear focus.

Customer service is a very challenging but rewarding career. Being in the B2B group changes the customer you speak with but does not change your ability to make a difference. One of the

first calls I received was from an optical office to order a replacement eyeglass frame for one of their patients. This is a very common call type and usually goes seamlessly. Unfortunately, these frames were a discontinued model and all sizes and colors were sold out. Our role as customer service representatives is to be problems solvers and always find a solution. When no solutions were immediately apparent, I began to fear that I would have to deliver bad news to this customer.

The woman I was assisting at the doctor's office explained why this was so critical. The frame belonged to a young disabled boy that could not go without his glasses, he had limited access to transportation and was going to be in their office the next day. It was the only time they could replace his frame. I now realized why she was desperate to make this happen, and now I was even more determined to find a solution. We had less than 30 minutes before our overnight shipping cut off time. I began to ask some probing questions to see what alternate solutions could work. One of

the questions I asked was if she had a lens cutting machine in her office and I was thrilled when she said she did. I remember thinking to myself, "This is it! We are going to make this work." I found the perfect frame for the patient, similar in style and shape and almost identical in measurements. I provided the good news to the office and she was ecstatic. I ordered the frame and upgraded the shipping to guaranteed overnight delivery at no charge. The woman from the office, who I had been working with on and off that entire day, was so appreciative that I was able to locate an option for

her and thanked me more than 10 times on our short phone call.

***“ This is it!  
We are going to  
make this work. ”***

I saved the customer's information and set myself a reminder to follow up with the client the next day just to make

sure everything went well. When I called, I spoke to the same woman I had worked with. I was excited to hear how everything went with the patient and was crossing my fingers that it went well. She said that he absolutely loved the frame and he couldn't stop looking at himself in the mirror. This was such a special experience in my career because I was able to help our customer and in turn see how they were able to help their customer. I realized that these are real people wearing our glasses and that's why I work for a company where our mission statement is "We Help People See." Our company does make a real difference in people's lives and I was able to witness it with this interaction. Experiences like this remind me why I love what I do.



# GREAT CX STORIES

**Rebecca Lee**

BLUECROSS BLUESHIELD OF VERMONT

## TAKING CONTROL AND OWNERSHIP

I took a call from a member one day that was questioning a bill he had received. The bill was for over a thousand dollars and he couldn't understand why he was getting this bill when his maximum out-of-pocket limit had been met for the year. He went on to explain to me that he had been undergoing treatment for two types of cancer and so far everything had been covered without issue. Hearing about his cancer diagnosis felt like a punch to the gut and immediately took my breath away, I couldn't imagine what he was going through. During such a challenging time in his life, I certainly did not want him worrying about a bill. I empathized with him, let him know I was sorry to hear about his health situation and that I could certainly take a look into his account to see why he was getting a bill. I placed the member on hold and looked into the dates of service he gave me from the bill he had received. I did not locate any claims that showed member responsibility. We had indeed been paying everything in full as his maximum out-of-pocket limit had been met. I was a bit puzzled, but I knew what I had to do next.

I got back on the line with the member and advised him of my findings. I explained that based on the claims we have processed, there is no reason he should be receiving that bill from the provider. I told him that I would be more than happy to give the provider's office a call for him so that I could review the processing and determine why they were sending him a bill. He happily accepted my offer. I could hear in his voice how tired he was so I gave him the option of either staying on the line while I outreached, or if he preferred I could give him a call back. He chose the latter. The moment I hung up and proceeded to outreach to the provider's office is when I realized that the provider I needed to call was located in NY and per BCBS guidelines, I was not able to call them directly. How was I supposed to take care of this for the member and resolve the issue if I couldn't call the provider? Thankfully, even though

I was not allowed to call the provider directly, I am allowed work with the provider's BCBS. I called BCBS of NY, explained the situation and asked if they could review the claims in question and outreach to their provider. The BCBS NY representative I spoke to was more than helpful, and after looking into the claims in question, it was determined that the provider was trying to bill my member for some late charges. The NY Plan explained that because the provider hadn't submitted them in a timely manner, they were not allowed to be billed to the member per their contract with BCBS NY and the charges needed to be written off. The BCBS NY representative then called the provider for me to discuss the claims with them and after a brief hold came back on the line to tell me that I could tell my member to disregard the bill.

I called the member back and shared the great news. I explained that he did not owe it and the provider was writing off the charges. He seemed almost shocked at first, he couldn't really believe it. He asked me in a couple different ways, "So you don't want me to pay this bill?", and "I don't need to pay this bill?" "That's correct!" I reassured him that the bill was sent to him in error and that the NY Plan had already discussed it with the provider and they are writing off the charges. This is when I heard a shakiness in his voice, and I could tell that he was choking back tears. What he said next made the hairs on my arms stand straight up because it felt so amazing to hear. He said, "I'm just so grateful, God bless you! I can't tell you how wonderful your service has been and how grateful I am, boy, if I do ever need anything else, I will remember your name girlfriend!"

Taking the member out of the middle, taking control and ownership of the situation, and working with another Blues Plan to resolve his call, had a positive impact on his life. Being a light in his day had a huge impact on my life as well.

# GREAT CX STORIES

Hannah Morphis

REGENCE BLUE CROSS BLUE SHIELD PLANS

## A FINANCIAL BURDEN

I am thankful to work for a company that is consumer focused and truly cares about the member and their experience. In Customer Service we are given the ability, tools, and encouragement to help members and I am thankful for that as well. I was especially thankful for this the day I spoke with one of our member's husband. This individual called in and explained he was calling

was correct. I gathered all the claims that processed out of network and requested an exception to process them as in network. Once approved, I called the hospitals that would be able to "balance bill" the member. I explained the situation to them and asked if they would be willing to take insurance payment and write off the rest to which they agreed.

***“He no longer owed the large sum of money, and I had managed to bring the cost down to \$0 for him.”***

for his wife, who had recently passed away. He had been trying to submit paperwork to appeal claims but was unable to get the fax to go through, so he wanted to send it another way.

I noticed there were only a few previous calls on her account and felt the need to review further to see why the member was appealing and if there was anything I could do to help. I found that his wife had many claims for the same brief timeframe and of these claims, there was an ambulance, emergency room, life flight, and inpatient hospital stay. Some of the claims were processing to their out-of-network benefits, leaving the member's responsibility to be well over \$20,000.

I pieced together that the member must have gone to the emergency room via ambulance and been life flighted to the inpatient hospital where she later passed. I called the hospitals to verify this and found I

This was all done in less than a week and I was then able to call the husband to inform him he no longer needed to complete what had already been a lengthy and exhausting appeal process. I let him know he no longer owed the large sum of money, and I had managed to bring the cost down to \$0 for him.

Being able to help him with such a large financial burden while he was going through one of the most difficult times in his life is why I love being a part of Regence. With each member I have the opportunity to speak with, I look for a way to make a positive impact on them and I was especially happy to be able to do so for this member.



## CONFERENCE ENTERTAINMENT

### Prohibition Themed Night

MAY 8<sup>TH</sup> 6:00 PM - 9:00 PM

Good Co. is the first live Electro Swing Band in the US. That new old sound, Electro Swing combines the era of illicit booze, jitterbugging flappers, and underground speakeasies with the funky beats and the electric sound of today's dance music. Good Co combines the sounds of the 1920s and 30s with rock, pop, latin, and even a touch of gospel and performs throughout the US and Canada.



### Casino Royale Night

MAY 9<sup>TH</sup> 9:00 PM - 11:30 PM

Join the fun for a world-class casino night experience for players of all levels to enjoy! The dealers add an element of Las Vegas authenticity, and make sure that even the most inexperienced players learn how to play a hand of cards or spin the wheel to win! We provide the casino chips, all you have to do is enjoy the experience!

### DJ Nightclub Experience

MAY 9<sup>TH</sup> 9:00 PM - 12:00 AM

DJ Mykro Douglas was born from the love affair of a super computer and an 8-track player, creating his desire to have one foot in the future and one foot in the analog past. Formally a drum'n'bass DJ, he has been overtaken by Soul Power and has a weekly night at The Keefer Bar in Vancouver playing funk and soul vinyl, bringing the grooves that make you throw your hands in the air like you just don't care. Take your vitamins, because Mykro Douglas will be keeping you up all night .

### Intimate Acoustic Experience

MAY 9<sup>TH</sup> 9:00 PM - 12:00 AM

Originally from the San Francisco Bay Area and a member of the 80's metal band TSUNAMI, KŌSH has been performing for over 30 years across the nation. From private intimate settings to stadium arenas, his contemporary and classic sounds create an entertaining experience for an evening you won't forget!



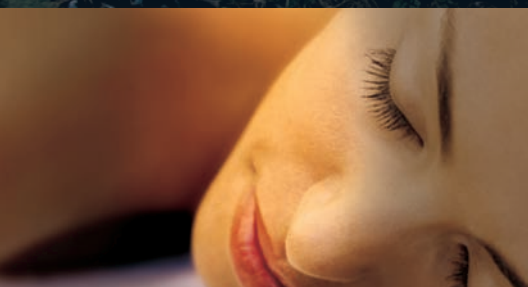




# CSR APPRECIATION DAY ACTIVITIES

Celebrate your CSRs' success by giving them a unique experience such as a spa day, wine tour, or an adventure outing where they then finish off the day by celebrating at the most prestigious event in the contact center industry at SQM's CX Industry Awards Gala dinner.

## SPA & RELAXATION




Escape to a place where beauty and relaxation are more than just skin deep. The Davenport Spa and Salon is your mid-city oasis of serenity and well-being. Enter the tranquility of the Grecian lobby and immediately feel the stress of daily life begin to dissipate. Let the trained hands of our expert staff pamper your body, soothe your mind and re-energize your soul. Their wellness spa offers the chance to surrender to relaxation and rejuvenation. Before or after your treatments, indulge in the aromatherapy steam room or relaxation reading room.

## GOLF QUALCHAN

Spokane's newest golf course features a creek meandering throughout the course, five ponds, wooded and hilly areas, and holes with open beauty and well-protected greens. Qualchan is located in a very natural setting and is a sanctuary for many species of birds and wildlife. Qualchan's par 72 and 6,559 yards will give all skill levels a special golf experience.



## PARTY TROLLEY CRAFT BEER TOUR



The Spokane Party Trolley provides a unique way to have fun in the form of transportation. The bike is "Earth-friendly" in that it burns no fossil fuels and is strictly powered by the pedaling of its passengers. Take in the sights and sounds of Spokane while embarking on a craft brewery tour with stops such as The Iron Goat, and Steam Plant historic brewery! During the adventure you will learn the beer making process from local brewmasters and enjoy multiple flights of beer. Before the tour ends, take a ride on the Riverfront Park's 1909 Looft Carrousel.





## ARBOR CREST WINERY & WILD CAT TOUR

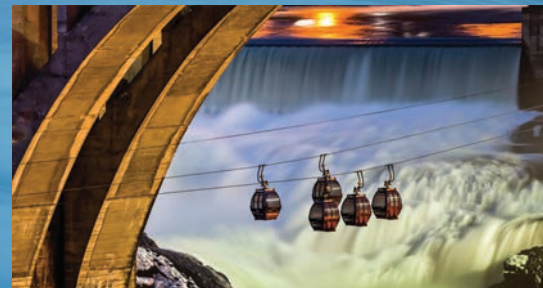
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Visit Cat Tales Zoological Park where rescued Big Cats and Bears can be hand fed, in a safe, secure home for the animals. Up next is Arbor Crest Winery, perched 450 feet above the Spokane river, a historic property with award-winning wines, stunning views, and park-like grounds that dazzle in every season. Enjoy 180 degree views while sampling exquisite wines.

## WALKING / GONDOLA TOUR

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With your knowledgeable guide, walk the site of the 1974 World Expo in Spokane, currently the Riverfront Park. Ride the gondola over the falls and learn the story behind it's creation. The walk is about 1 mile long, and crosses the Spokane River multiple times. Along with lunch at a popular downtown eatery, enjoy wine tastings from 3 different vineyards.



## ZIPLINE ADVENTURE

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Four zip lines, a sky bridge and views that are out of this world are what make Timberline Adventures the ultimate outdoor experience in Coeur d'Alene. A Yamaha Viking UTV will be waiting for you upon arrival at the property. An exciting mile long drive with an 800ft vertical foot climb is what lies between you and your first step off our platform and into the sky. You will soar from tree to tree for two to two and a half hour before ending the course with an epic surprise.



# NEED MORE FLEXIBILITY?

## SIMPLE TO USE, CUSTOMER EXPERIENCE SOFTWARE

### Define Custom Metrics and Flexible Dashboards

Make it easy for your employees to focus on what's important to them. Customize the software to make it work the way you want.

### Service Recovery Opportunity Notifications

Get the right information to the right employees in real-time. Act quickly to improve CX based on individualized triggers for each unique part of your enterprise.

### Consolidated Customer Experience Reporting

Collect customer/employee feedback data from multiple survey methods to provide simple, flexible, and consolidated reporting.

### Benchmark Customer Experience Performance

Understand how you stack up against average and best-performing organizations.



Let us provide you with more flexibility.  
[inform@sqmgroup.com](mailto:inform@sqmgroup.com)

*my* **SQM** <sup>TM</sup>  
CX Insights