

OFFICIAL AWARDS GUIDE 2016



17th Annual Conference
ONE CONTACT RESOLUTION
Research and Best Practices and Contact Center Industry Awards

Coeur d'Alene, Idaho May 17th - 19th 2016

CONTACT CENTER OCR EXPERTS

Since 1996, SQM has been a leading North American contact channel industry customer survey research firm and VoC expert for improving organizations' one contact resolution (OCR), first contact resolution (FCR), operating costs, employee satisfaction (Esat), and customer satisfaction (Csat). We have done this by being operationally excellent at benchmarking, tracking, consulting, and recognizing our clients' OCR, FCR, Esat, and Csat performance. Over 70% of our tracking clients improve their FCR and operating costs year over year. For the average contact center SQM benchmarks, a 1% improvement in their FCR performance equals \$286,000 in annual operational savings.

SQM offers four different post-contact surveying methods (i.e., phone, IVR, web, and SMS). Our post-contact survey is based on proven survey questions that provide accurate results and clear insights on areas to improve. SQM conducts all phone surveys using our own dedicated workforce. All post-contact survey methods can be integrated into one common database. We can also survey within five minutes of the customer's contact to an organization without having to rely on a call transfer into our technology. Our dialer/quota management system allows us to accurately deliver a survey quota at a CSR level or any other survey quota level that is required. To ensure the quality of our survey data and feedback collection, SQM monitors 100% of our survey calls. The accuracy of each telephone survey representative is individually tracked and must comply with our minimum error rate of less than 1%.

We have two state-of-the-art research contact centers located in Coeur d'Alene, Idaho and Vernon, British Columbia to conduct professional customer surveys with customers who used a contact channel. SQM is recognized by the contact center industry as a leading research firm VoC expert for analyzing OCR, FCR, Csat, and customer experience performance. Our research analyst professionals have strong mathematical academic backgrounds. They understand the contact center industry and stay current with the best practices for capturing, analyzing, and reporting VoC qualitative and quantitative data. Specifically, SQM research analysts use VoC metrics such as OCR, FCR, Csat, and the Customer Protection – CP SCORE™ to truly understand how a contact channel impacts the customer service experience, operating costs, and the ability of the contact center to retain customers.





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LETTER FROM SQM'S CEO & FOUNDER

SQM's 17th Annual Most Prestigious North American Contact Center Industry 2015 Awards for Service Quality Excellence Program

Dear SQM Guest,

Thank you for choosing to attend SQM's 17th Annual One Contact Resolution Research and Best Practices Conference with the Most Prestigious North American Contact Center Industry Awards for Service Quality Excellence. This year we are proud to introduce our new metric – One Contact Resolution. One Contact Resolution (OCR) is a voice of the customer metric measuring customers using only one contact channel to resolve their inquiry or problem in one contact. Each year, we recognize organizations that have demonstrated a best practice that they have used to improve or help maintain high FCR performance. We have 5 new Industry Best Practice awards this year that highlight our focus on OCR across all contact channels or using multiple channels: Omni-Channel, Web Self-Service Channel, IVR Self-Service Channel, Email Channel, and Emerging Channels. This gives us 15 Best Practice awards for this year.

At this year's conference, SQM will be releasing our new book, One Contact Resolution – Contact Channels Research and Best Practices, written by Mike Desmarais and Lara Pow. This book describes how to measure and improve OCR – The Metric that Matters the Most for Improving Multi-Channel Customer Experience. The book showcases ground-breaking customer research on contact channel (e.g., call center, email, chat, web self-service, and IVR self-service) customer experiences for resolving an inquiry or problem. The book also includes operational research from SQM interviewing over 250 senior contact center executives, which includes the 5 essential areas for effective and efficient contact channel and omni-channel operating practices: Customer Experience Strategy, Operating Practices, Tools and Technology, Workforce Utilization, and Customer Feedback. In addition, the book provides 15 best practice case studies from award winning organizations. The One Contact Resolution book is valued at \$499 but every participant of the Management and Executive tracks will receive a free copy of this book.

As a result of benchmarking in excess of 500 contact centers and surveying more than 1.5 million customers and 25,000 CSRs on an annual basis, SQM is pleased to announce our 2015 award winning contact centers and frontline employees. At this year's awards ceremony, we will recognize 62 organizations with over 60 different awards including Contact Center of the Year, First Call Resolution (FCR) Improvement, World Class FCR Certification, Highest Employee Satisfaction (Esat), Highest Customer Service, FCR Leadership, FCR Champion, and Industry Best Practice Awards.

We will also recognize the Top 25 World Class CSR Finalists who are the "best of the best" Certified World Class CSRs, and of those 25 CSRs, we will announce the 2015 CSR of the Year. The CSR of the Year will be given \$1,000 in cash at the awards ceremony. SQM will also recognize the Top 5 World Class Call CSR Improvement Winners for 2015. In addition, we will be recognizing the Top 6 World Class Supervisors who are the "best of the best" Certified World Class Supervisors, and of those 6 Supervisors, we will announce the 2015 Supervisor of the Year. The Supervisor of the Year will also be given \$1,000 in cash at the awards ceremony. We believe that supervisors are a key ingredient to creating World Class FCR, Esat, and Csat contact center performance.

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

Sincerely,

A handwritten signature in blue ink that reads "Mike Desmarais". The signature is written in a cursive, flowing style.

Mike Desmarais
CEO & Founder | SQM Group



CONTACT CENTER OF THE YEAR AWARD

WINNER:



ORGANIZATION:

| VSP Vision Care

CRITERIA:

Criteria used for Contact Center of the Year are based on having the highest combined customer FCR and employee overall very satisfied (top box response) rating.

FINALISTS:



| Canadian Tire Financial Services - Sales and Service



| Jackson

BEST PERFORMING SMALL- TO MID-SIZED CONTACT CENTER AWARD

WINNER:

ORGANIZATION:

| BlueCross BlueShield of Vermont

CRITERIA:

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

FINALISTS:

| 407 ETR

| TELUS Sourcing Solutions Inc.

CONTACT CENTER WORLD CLASS FCR CERTIFICATION

RECIPIENTS:

- | 211 Ontario
- | 407 ETR
- | BC Automobile Association (BCAA)
- | Blue Cross Blue Shield of Michigan (Web Support Help Desk)
- | BlueCross BlueShield of Vermont
- | Canadian Tire Financial Services – Sales and Service
- | Canadian Tire Roadside Assistance
- | Enbridge Large Business Accounts
- | ENMAX, Inc.
- | FortisBC
- | Genworth Life Customer Service
- | Insurance Corporation of BC (DTVI & BEU)
- | Jackson
- | Marchon Eyewear Inc.
- | Millennium1 Solutions (Credit Card Sales Segment)
- | Prime Therapeutics (Nebraska & New Mexico)
- | Regence BlueCross BlueShield of Oregon
- | Rogers Enterprise Service Delivery
- | Scotiabank (Halifax)
- | Scotiabank International (Dominican Republic)
- | Scotiabank International (Jamaica)
- | Scotiabank International (Mexico)
- | ScotiaLife Financial
- | Sun Life Financial Group Retirement Services (Waterloo)
- | Vancity
- | VSP Vision Care (California & Ohio)

CRITERIA: *Criteria used for Contact Center FCR Certification are 80% or higher of the calls are FCR for 3 months or more. SQM's FCR call criteria are based on the customer's call being resolved on the first call.*



WEB SELF-SERVICE WORLD CLASS FCR CERTIFICATION

ORGANIZATION:

| FortisBC

CRITERIA:

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

CONTACT CENTER WORLD CLASS BEST PRACTICE CERTIFICATION

CSR Coaching Program

| Excellus BlueCross BlueShield

CRITERIA:

To be eligible, an organization must complete a minimum sample size of 100 CSR online surveys, or 90% of employees if less than 100 employees at the organization, must have completed the online survey.

Customer surveying must have been conducted for a minimum of 3 consecutive months during the Award year from January 1, 2015 to December 31, 2015. A minimum sample size of 800 customer live telephone surveys taken from a random selection of calls that reflects your actual call type volume is required.

Best Practice criteria must be validated by an onsite evaluation conducted by an SQM Consultant.



BEST PRACTICES AWARD WINNERS

CATEGORY:

Omni-Channel
 Web Self-Service Channel
 IVR Self-Service Channel
 Chat Channel
 Quality Assurance
 Desktop Application(s)
 CSR Recognition Program
 Career Development Program
 Call Handling Practice
 Real-Time CSR Support Queue
 Performance Management System
 CSR Coaching Program
 CSR Training Program
 CSR Hiring Process
 Standard Operating Practices

ORGANIZATION:

| American Express
 | FortisBC
 | VSP Vision Care
 | UPMC Health Plan
 | Millennium1 Solutions
 | Comcast Cable
 | BlueCross BlueShield of Vermont
 | Sun Life Financial
 | Canadian Tire Financial Services
 | Blue Cross Blue Shield of Massachusetts
 | Cogeco Connexion
 | Scotia iTRADE
 | Nationstar Mortgage
 | Dialog Direct & Prime Therapeutics
 | VSP Vision Care
 | Accenture Business Services for Utilities Inc.
 | FedEx Express Canada

CRITERIA:

These awards recognize the organization that has demonstrated they have improved or helped maintain high FCR and Csat performance. Organizations submit specific practices they have used to improve or maintain high FCR and Csat performance.

BEST VENDOR CUSTOMER SOLUTION AWARD

ORGANIZATION:

| Ulysses Learning

CRITERIA:

This award is presented to the vendor who has been mentioned the most in an unsolicited manner from organizations for helping them improve their FCR and Csat performance.



CSR FINALISTS FOR CSR OF THE YEAR

CSR NAME:

- | Troy Hammond Little
- | Daniel Peters
- | Alex Beeks
- | Pamela Cragin
- | Amir Shokoohi
- | Amanda Emerson
- | Amy Duhamel
- | Terry Kelty
- | Samantha Cook
- | Enza Pitruzzella
- | Nazreen Abdulla
- | Tyler Fitzsimons
- | Anderson Henry
- | Awaldi Stuart
- | Kaylyn Beckwith
- | Trina Hardiman
- | Joseph Jablanofsky
- | Russel Valendo
- | Heather Sundheim
- | Brooke Jobe
- | Mona Rghif
- | Sammer Salama
- | Ruby Sahota
- | Stephanie Motovsky
- | Carol Elder

ORGANIZATION:

- AmeriHealth Caritas
- Blue Cross Blue Shield of Massachusetts
- Blue Cross and Blue Shield of South Carolina
- Blue Cross and Blue Shield of South Carolina
- Blue Cross and Blue Shield of South Carolina
- BlueCross BlueShield of Vermont
- BlueCross BlueShield of Vermont
- BlueCross BlueShield of Vermont
- CareFirst BlueCross BlueShield
- LoyaltyOne
- LoyaltyOne
- Marchon Eyewear Inc.
- Millennium1 Solutions
- Millennium1 Solutions
- Millennium1 Solutions
- Millennium1 Solutions
- Nationstar Mortgage
- Nationstar Mortgage
- Premera Blue Cross
- Regence BlueCross BlueShield
- Scotia iTRADE
- Scotia iTRADE
- Sun Life Financial
- Sun Life Financial
- VSP Vision Care

CRITERIA:

To be eligible the customer representative must be a World Class Certified customer representative. The criteria for a Certified World Class Customer Representative is 85% or higher of the calls surveyed are at the world class call level. SQM's world class call criteria are based on the customer's call being resolved and the customer is overall very satisfied (top box response) rating with the customer service representative (CSR). Call center management must also send an example of a great customer service story that the CSR delivered.

CSR TOP 5 WORLD CLASS CSAT IMPROVEMENT WINNERS

CSR NAME:

- | Heather Wachs
- | Rajesh Gill
- | Gloria Fritz
- | Kirk Chase
- | Irene Dent

ORGANIZATION:

- Blue Cross and Blue Shield of Kansas
- ENMAX, Inc.
- Regence BlueCross BlueShield
- VSP Vision Care
- VSP Vision Care

CRITERIA:

To be eligible, a customer representative must have improved their WCC (World Class Call) performance by 10% from the previous year. SQM's WCC criteria are based on the customer's call being resolved and the customer is overall very satisfied (top box response) with the CSR. Call center management must also send an example of a great CSR Csat improvement story.



SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

| SUPERVISOR NAME: | ORGANIZATION: | CRITERIA: |
|-------------------------|--------------------------------------|--|
| Shantell Edwards | 407 ETR | <i>To be eligible the supervisor must be a World Class Certified supervisor. The criteria for a Certified World Class Supervisor is 85% or higher of the calls surveyed are at the world class call level. Call center management or CSRs must also send an example of a great Call Resolution or Csat coaching story.</i> |
| Lindsey Abbott | Blue Cross and Blue Shield of Kansas | |
| Shawn Nichols | ENMAX, Inc. | |
| Muriel Rafuse | Millennium1 Solutions | |
| Lucie Novotny | Sun Life Financial | |
| Jennifer Riggle | VSP Vision Care | |

CUSTOMER SATISFACTION & FIRST CALL RESOLUTION AWARDS

Highest Customer Satisfaction for the Contact Center Industry Awards

| ORGANIZATION: | AWARD: | CRITERIA: |
|--|--|--|
| Vancity | 1. Best Selling Customer Satisfaction | <i>1. This award recognizes the contact center with the highest Csat (top box response) rating for selling approach.</i> |
| Canadian Tire Financial Services – Sales and Service | 2. Highest Omni-Channel Customer Service | <i>2. This award recognizes the contact center with the highest overall Csat (top box response) rating for the entire omni-channel experience.</i> |
| FortisBC | 3. Highest Web Self-Service Customer Service | <i>3. This award recognizes the contact center with the highest overall Csat (top box response) rating for the web self-service channel.</i> |
| Cogeco Connexion | 4. Highest Field Services Customer Service | <i>4. This award recognizes the contact center with the highest overall Csat (top box response) ratings for the fields service channel.</i> |



Highest Customer Service by Industry Awards

ORGANIZATION:

- | Vancity
- | Jackson
- | Canadian Tire Financial Services – Sales and Service
- | VSP Vision Care
- | Prime Therapeutics
- | Prime Therapeutics
- | Blue Cross of Idaho
- | Cogeco Connexion (Storefront)
- | ENMAX, Inc.
- | Cogeco Connexion
- | Blue Cross Blue Shield of Michigan (Web Support Help Desk)
- | 211 Ontario
- | Marchon Eyewear Inc. / VSP Vision Care

AWARD:

- Banking
- Financial
- Credit Card
- Insurance
- Health Care
- Pharmacy
- Health Care FEP
- Retail/Service
- Energy
- Telco/TV
- Helpdesk
- Government
- Business to Business

CRITERIA:

Based on having the highest FCR for an organization in each specific industry/sector.

First Call Resolution Improvement Awards

ORGANIZATION:

- | 407 ETR (Collections)
- | BlueCross BlueShield of Illinois
- | BlueCross BlueShield of Montana
- | BlueCross BlueShield of New Mexico
- | BlueCross BlueShield of Oklahoma
- | BlueCross BlueShield of Texas
- | CareFirst BlueCross BlueShield
- | Canadian Tire Customer Relations
- | Enbridge Large Business Accounts
- | Excellus BlueCross BlueShield
- | Independence Administrators – IBC
- | HCL
- | Millennium1 Solutions (Credit Card Sales & High Value Segments)
- | Nationstar Mortgage
- | ScotiaLife Financial

CRITERIA:

Based on a 5% or greater annual FCR improvement from the most recent study within the last two years.



EMPLOYEE SATISFACTION AWARDS

Highest Employee Satisfaction for the Contact Center Industry Award

ORGANIZATION:

| Canadian Tire Financial Services – Sales and Service

CRITERIA:

Based on having the highest employee overall very satisfied (top box response) rating with working in their contact center.

Most Improved Employee Satisfaction Award

ORGANIZATION:

| Jackson / VSP Vision Care

CRITERIA:

Based on having the most improved employee overall very satisfied (top box response) rating with working in their contact center.

Highest Employee Satisfaction by Industry Awards

ORGANIZATION:

| Arizona Public Service

AWARD:

Energy

CRITERIA:

Based on having the highest employee overall very satisfied (top box response) rating with working in their contact center for each specific industry.

| Canadian Tire Financial Services – Sales and Services

Financial

| VSP Vision Care

Insurance

| BlueCross BlueShield of Vermont

Health Care

| TELUS Sourcing Solutions Inc.

Outsourcer

Highest Work From Home Employee Satisfaction

ORGANIZATION:

| Scotiabank

CRITERIA:

Based on having the highest employee overall very satisfied (top box response) rating for work from home CSRs.

World Class Employee Satisfaction Awards

ORGANIZATION:

| Arizona Public Service

| BC Automobile Association (BCAA)

| BlueCross BlueShield of Vermont

| Canadian Tire Bank (CSG)

| Canadian Tire Financial Services – Sales and Service

| Jackson

| Nationstar Mortgage

| TELUS Sourcing Solutions Inc.

| VSP Vision Care

CRITERIA:

Based on 50% or higher of employees rate their overall experience of working in the contact center as very satisfied (top box response) rating.



FCR LEADERSHIP AWARDS

FCR LEADER NAME:

- | Steve Akeley
- | Windy McClure
- | Kathy Rodine

ORGANIZATION:

- Blue Cross Blue Shield of Massachusetts
- Consumers Energy
- VSP Vision Care

CRITERIA:

These awards are judged by a panel of SQM Client Account Managers who work closely with our tracking clients on an ongoing basis. Final award determination made by Mike Desmarais, CEO and Founder of SQM Group.

FCR CHAMPION AWARDS

FCR CHAMPION NAME:

- | Elaine Caldwell
- | Nancy Earley
- | Holly Abbott
- | Ken Baur

ORGANIZATION:

- CooperVision
- Excellus BlueCross BlueShield
- Millennium1 Solutions
- Security Health Plan

CRITERIA:

These awards are judged by a panel of SQM Client Account Managers who work closely with our tracking clients on an ongoing basis. Final award determination made by Mike Desmarais, CEO and Founder of SQM Group.

Winner of SQM’s Contact Center FCR Best Practice – Chat Channel

UPMC HEALTH PLAN

UPMC Health Plan’s Health Care Concierge program brings a personalized touch to serving their membership, acting as a personal guide through the world of health care. The concierge teams ensure members feel that UPMC Health Plan genuinely cares about their health and well-being by connecting them to world class care, truly making a difference in people’s lives.

UPMC Health Plan has a keen focus on Service Excellence and First Call Resolution, creating an outstanding Member Experience. There is a dedication to solving the problem the first time and to inspire confidence with the member that their health coverage is in great hands.

UPMC Health Plan is committed to create innovative, sustainable, and personal interactions across multiple channels. A concierge can be reached by several digital channels including: secure messaging, online live chat, mobile app, live mobile chat, and social media.

Company information:

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SQM'S 17TH ANNUAL MOST PRESTIGIOUS NORTH AMERICAN CONTACT CENTER INDUSTRY 2015 AWARDS FOR SERVICE QUALITY EXCELLENCE PROGRAM



SQM is pleased to announce our 2015 award winning contact centers and frontline employees. This is SQM's 17th Annual Most Prestigious North American Contact Center Industry Awards for Service Quality Excellence.

SQM benchmarks over 500 leading international call centers on an annual basis and has been conducting one contact resolution (OCR), first call resolution (FCR), employee satisfaction (Esat) and customer satisfaction (Csat) benchmarking studies since 1996. On an annual basis, SQM conducts over 1.5 million surveys with customers who have used a contact channel. SQM also conducts over 25,000 surveys annually with employees who work in a contact center. Based on our contact center benchmarking studies, SQM awards excellence in customer FCR, customer and employee satisfaction for the contact center industry. We have recognized leading North American contact centers for customer and employee satisfaction since 1998.

For each contact center that participated in our customer 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 contact channel improve OCR, FCR, and Csats performance. SQM's contact center awards are based on customers who have used a contact channel and employees who work in a contact center. SQM conducted the benchmarking studies for the period of January 1st, 2015 to December 31st, 2015. SQM has more than 60 different awards that recognize the top performing contact centers.

Criteria used for Contact Center of the Year are based on having the highest combined FCR and employee overall very satisfied (top box response) rating. Criteria used for

Best Performing (Small/Mid-Size) Contact Center (under 100 CSRs) are based on having the highest combined customer FCR and employee overall very satisfied (top box response) rating.

Criteria used for Contact Center World Class FCR Certification are 80% or higher of the calls are at the world class level for 3 consecutive months or more in 2015. SQM's world class call criteria are based on the customer's call being resolved on the first call to the contact center.

In 2015, SQM added five new Best Practices. The categories for these 15 awards were: Omni-Channel, Web Self-Service Channel, IVR Self-Service Channel, Email Channel, Emerging Channels, Quality Assurance, Desktop Application(s), CSR Recognition Program, Career Development, Call Handling Practice, Real-Time CSR Support Queue, Performance Management System, CSR Coaching Program, CSR Training Program, and CSR Hiring Process. These awards recognize the organization that has demonstrated as a result of their best practice that they have improved or helped maintain high first contact resolution and customer satisfaction performance. Submissions were invited from clients and non-clients through an on line application and were judged by a panel of 6 subject matter experts to determine the finalists and winners.

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

One Contact Resolution Research & Best Practices Conference Agenda

Overview

Monday, May 16th – Meet & Greet Welcome Event

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

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

| | | |
|---------------------|------------------------------------|---|
| 7:30 am – 9:00 am | Boat Cruise & Breakfast | Boat Cruise to Hagadone Events Center Meet at the lakefront boardwalk at Coeur d’Alene Resort to board the cruise boat at 7:30 am to cruise the lake on your journey to the Hagadone Events Center and eat breakfast. Boat departs at 8:00 am. |
| 9:30 am – 11:00 am | Hagadone Events Center | One Contact Resolution Research - Mike Desmarais, CEO and Founder, SQM Group SQM will share highlights from our new book titled One Contact Resolution, focusing on contact channel operational, customer experience research and best practices. |
| 11:00 am – 12:00 pm | | Chat Channel Best Practices – Anne Palmerine, Associate Vice President, Customer Engagement & Enrollment Services, UPMC Health Plan The best practices they used to achieve world class chat channel service. |
| 12:00 pm – 1:30 pm | | Buffet Lunch & Hole-in-One Tournament Try your golf hand at SQM’s Hole-in-One Prize Tournament on one of the most beautiful and unique golf holes in the world. |
| 1:30 pm – 2:30 pm | | Website Self-Service Best Practices – Scott Webb, Manager, Customer Programs and Research, FortisBC The best practices they used to achieve world class website service. |
| 2:30 pm – 3:30 pm | | IVR Self-Service Best Practices – Lisa Duenas, Senior Operations System Administrator, Vision Service Plan The best practices they used to achieve world class IVR service. |
| 3:30 pm – 5:45 pm | Hagadone Garden Boat Cruise & Tour | Boat Cruise to Hagadone Gardens Board the boats again at 3:30 pm to cruise to the Hagadone Gardens. Boat departs gardens at 5:45 pm. |
| 5:45 pm – 8:00 pm | Boat Cruise & Dinner | Boat Cruise Dinner Enjoy a splendid gourmet buffet dinner that is guaranteed to please. |

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

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

| | Executive Track (By invitation only) Boardroom 5ABC | Management Track (Available to all conference attendees) Bay 2 |
|---------------------|---|---|
| 7:00 am – 8:00 am | Breakfast Buffet at Club Coeur d’Alene | Breakfast Buffet at Bay 3-4 |
| 8:00 am – 9:00 am | Contact Channel Operational Benchmarking Research Mike Desmarais, SQM | Real-Time CSR Support Queue Matthew Schrickler, BCBS Massachusetts |
| 9:00 am – 10:00 am | | CSR Call Resolution Training Mary Murcott, Dialog Direct / Lisa Gregovich, Prime Therapeutics |
| 10:00 am – 10:15 am | Coffee Break at Boardroom 5ABC | Coffee Break at Bay 2 |
| 10:15 am – 11:15 am | Performance Management System Nathalie Larouche, Cogeco Connexion | 3x Consecutive FCR Improvement Winner Jody Windhorst, Nationstar Mortgage |
| 11:15 am – 12:45 pm | Lunch Buffet at Club Coeur d’Alene | Lunch Buffet at Bay 3-4 |

| | | |
|--------------------|--|--|
| 12:45 pm – 1:45 pm | Real-Time CSR Support Queue Matthew Schricker, BCBS Massachusetts | CSR Hiring Process Rachel Stuchberry and Gabriella Marrone, Accenture Business Services for Utilities |
| 1:45 pm – 2:00 pm | Coffee Break at Boardroom 5ABC | Coffee Break at Bay 2 |
| 2:00 pm – 3:00 pm | 3x Consecutive FCR Improvement Winner Jody Windhorst, Nationstar Mortgage | Performance Management System Nathalie Larouche, Cogeco Connexion |
| 5:00 pm – 8:00 pm | “A Taste of Idaho” Themed Dinner at Hagadone Events Center Board the cruise boat to head over to the events center and join us for an evening sampling a variety of the best Idaho potato culinary creations, complete with campfires and s’mores on the beach. Featuring live entertainment by The Ryan Larsen Band. Boat departs at 5:30 pm. | |

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

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

| | Executive Track Boardroom 5ABC | Management Track Bay 2 | mySQM™ Intro Bay 1A | CSR Appreciation Day |
|---------------------|---|---|--|--|
| 8:00 am – 9:00 am | Breakfast at Coeur d’Alene | Breakfast Buffet at Bay 3-4 | | |
| 9:00 am – 10:00 am | TCPA Compliance Christine M. Reilly, JD, Partner, Manatt, Phelps & Phillips, LLP | CSR Recognition Program Emily Fair, BCBS Vermont | Introducing the New mySQM™ Web Portal | CSR Appreciation Day Activities Available <ul style="list-style-type: none"> • Float Plane Package (new) • Zip Line Tour (new) • Horseback Riding (new) • Outdoor Adventure Package • Sushi, Sake & Beverly’s Wine Tour & Tasting • Golf Coeur d’Alene Course • Body Treatments at Coeur d’Alene Spa |
| 10:00 am – 11:00 am | CSR Coaching Program Austin Cobb, Nationstar Mortgage | Standard Operating Practice Patsy Bertoia, FedEx Canada | | |
| 11:00 am – 11:15 am | Coffee Break at Boardroom 5ABC | Coffee Break at Bay 2 | | |
| 11:15 am – 12:15 pm | CSR Training Mary Murcott, Dialog Direct / Lisa Gregovich, Prime Therapeutics | Quality Assurance Program Holly Abbott, Millennium1 Solutions | Break | |
| 12:15 pm – 1:30 pm | Lunch Buffet at Club Coeur d’Alene | Lunch Buffet at Casco Bay/Kidd Island | | |
| 1:30 pm – 2:30 pm | CSR Recognition Program Emily Fair, BCBS Vermont | CSR Coaching Program Austin Cobb, Nationstar Mortgage | Introducing the New mySQM™ Web Portal | |
| 2:30 pm – 3:30 pm | Standard Operating Practice Patsy Bertoia, FedEx Canada | TCPA Compliance Christine M. Reilly, JD, Partner, Manatt, Phelps & Phillips, LLP | | |

Awards Ceremony Celebration & Gala Dinner

| | | |
|--------------------|-----------------------------------|--|
| 5:00 pm – 6:00 pm | Whispers Lounge | Cocktail Reception |
| 6:00 pm – 12:00 am | Convention Center Ballroom | Gala Dinner & Awards Ceremony Semi-Formal Attire – Black Tie Welcome This is SQM's 17th Annual Most Prestigious North American Contact Center Industry Awards Program for Service Quality Excellence – as judged by customers who used a contact center and by employees who work in the contact center. SQM will be presenting Service Quality Excellence Awards and Certificates. Featuring Live Entertainment by Rockadelic |

Friday, May 20th

End of Conference

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

Live Entertainment



ERIC HENDERSON

Monday, May 16th

Eric Henderson is a 20 year old musician out of Seattle, Washington, currently residing in the eastern Washington/Idaho area. Eric has been playing music for as long as he can remember, and that has helped him find many different kinds of music over the years. Influences include anyone from John Mayer, to Jimi Hendrix, to Musiq Soulchild, and on. It's just Eric and an acoustic guitar on stage, and with that he is allowed to play a vast majority of music, in many different styles.



RYAN LARSEN BAND

Wednesday, May 18th

Established in 2007, The Ryan Larsen Band is a multi-award winning Country Rock band in the Spokane Washington area playing music in the vein of Garth Brooks, Kenny Chesney, Jason Aldean, Toby Keith and Eric Church and others. With an emphasis on high energy live performances with seasoned veteran musicians we make great music that's sure to get the crowd going and keep them going.



ROCKADELIC

Thursday, May 19th

ROCKADELIC is a party rock band that features KOSH and 3 extremely talented musicians from the Northwest. KOSH – lead vocals & guitar, Lane Sumner – lead guitar & vocals, P.J. Paul – bass guitar & vocals and Brian Burke – drums & vocals. Together they bring high energy party music from yesterday and today guaranteed to get the party started! Originally a member of the 80's metal band TSUNAMI, KOSH has shared the stage with many international acts such as Kid Rock, Bret Michaels, and Metallica.



THE ACROBATS OF CIRQUE-TACULAR

Thursday, May 19th

The Acrobats of Cirque-tacular is produced by Cirque-tacular Entertainment. Through thousands of performances in the last eight years, their work has been enjoyed in over 70 countries, by millions live, in conjunction with the most recognized brands, venues, and arts organizations of our age. The Acrobats of Cirque-tacular are thrilled to join SQM's Conference on Thursday night!



GAGAGIRL

Thursday, May 19th

Pa, pa, pa party time, pa, pa party time! Whether it's a gown made of meat or an egg shaped carriage, there is no telling what this Lady Gaga impersonator will bring. Just don't be surprised when the paparazzi shows up! So don't be star struck, just dance. Go ahead and marry the night with some bad romance!

SQM CONFERENCE SPEAKERS



MIKE DESMARAIS

Chief Executive Officer and Founder
SQM Group

Mike Desmarais is the Chief Executive Officer and Founder of SQM Group. Mike has over 25 years of contact center service quality measurement, benchmarking and consulting experience. As a consultant, Mike has experience in working with leading North American contact centers on improving their first contact resolution, cost, employee satisfaction and customer satisfaction performance. Mike has been a pioneer and visionary for contact channels voice of customer measurement of first call resolution, one contact resolution, seamless resolution and customer protection metrics. Mike has written four thought-provoking contact center books, [World Class Call Center](#), [First Call Resolution](#) and [FCR Best Practices](#) and most recently [One Contact Resolution](#). Mike is considered North America's leading authority on contact center first contact resolution measurement and best practices. In addition, Mike oversees the operations of two contact centers, located in Vernon B.C. and Coeur d'Alene ID, with over 100 frontline representatives who conduct telephone customer satisfaction surveys and call quality assurance assessments.



CHRISTINE M. REILLY

Partner
Manatt, Phelps, & Phillips, LLP

Christine M. Reilly, JD, is a litigation partner in Manatt, Phelps, & Phillips, LLP's Los Angeles office and co-chair of the TCPA Compliance and Class Action Defense practice group. Ms. Reilly regularly defends clients in consumer class actions and investigations and proceedings initiated by the Federal Trade Commission, Federal Communications Commission, Consumer Financial Protection Bureau, and other federal and state regulatory agencies. Ms. Reilly specializes in the defense of claims brought under the Telephone Consumer Protection Act (TCPA) and is a frequent speaker and writer on the TCPA.

GUEST SPEAKERS



HOLLY ABBOTT

Director, Quality Assurance and Corporate Communications
Millennium1 Solutions

Holly Abbott is the Director, Quality Assurance and Corporate Communications for Millennium1 Solutions. She has held this position for the last 8 years. Holly will be sharing details of Millennium1 Solution's Best Practice Award winning quality assurance program.



PATSY BERTOIA

Managing Director, Customer Experience and Global Trade Services FedEx Express Canada

Patsy Bertoia's primary responsibility is to ensure every experience a customer has with FedEx is outstanding. As Managing Director of FedEx Express Canada's three customer contact centres and Global Trade Services teams, Bertoia and her team of 900 service and advisory professionals help connect Canadian businesses with Canadians and the world every day.

Bertoia has extensive experience adopting to and anticipating new trends in Canada's transportation industry. This includes the implementation of new communications platforms within FedEx Express Canada's contact centres and the integration of new digital customer service portals. She is instrumental in developing best practices that have led FedEx Express Canada to be the only employer in Canada to be certified 13 times, including a record eight straight "platinum" designations in a row. Bertoia was also the recipient of the Exceptional Customer Service Experience award in 2014 by the Customer Service Professional Network.



JAY CASTERGINE

Business Consulting Nuance

With over thirty years in the Information Technology industry, Jay Castergine is passionate about helping companies create compelling customer experiences. For the last ten years at Nuance, he has managed customer engagements focused on Contact Center IVR strategy and roadmaps and is a subject matter expert for the Healthcare industry. As part of his Business Consulting role at Nuance, he supports efforts to design and support both inbound as well as outbound strategies. Prior to Nuance, Jay held positions at Viacore, Electronics Information Systems and Western Union. Jay lives in New Jersey with his family and is an avid sports fan, especially baseball and hockey.



AUSTIN COBB

Vice President of Customer Service Nationstar Mortgage

Austin Cobb is Vice President of Customer Service at Nationstar Mortgage. He has been with the company for over 10 years, and has run a variety of operations within servicing, both on and offshore. He was a critical force in improving First Call Resolution by nearly 20% over the past 3 years, and was a key player in the design, implementation and execution of the company's award winning agent coaching program.



LISA DUENAS

Senior Operations Systems Administrator Vision Service Plan

Lisa Duenas joined VSP in 1994. In her tenure at VSP she has served as a Customer Service Representative, CSR2, Team Lead, Business Specialist, Business Analyst, and Senior Operations Systems Administrator. Her breadth of knowledge on VSP products and operations has established her as an invaluable subject matter expert within the company. She has been VSP's IVR Product Owner since 2008. In this role she is responsible for managing and designing the five IVR applications within the company. She strives to ensure the applications are user friendly and help support the company's FCR and Customer Experience goals. She has such a strong passion and love for IVR her team has dubbed her "The Queen of IVR".



EMILY FAIR
Director of Customer Service
BlueCross BlueShield of Vermont

Emily Fair has been with BCBSVT for 18 years, and has been instrumental in transforming the BCBSVT call center into a World Class call center. As Director of Customer Service, Emily has led the Customer Service division to historical performance highs in Member Touchpoint Measures (MTM), and achieved best in class employee engagement and retention levels. Starting out as a Customer Service Representative, Emily has assumed greater levels of responsibility over the years by demonstrating leadership by example, and motivating others through her collaborative style. Emily has developed staff training, programs and a culture within Customer Service that focuses on outstanding experiences for all the members and providers served by BCBSVT.



LISA GREGOVICH
Manager, Vendor Operations
Prime Therapeutics

Lisa Gregovich started with Prime Therapeutics in 2013 as the Manager, Vendor Operations. Lisa is an experienced call center leader and who has held leadership positions at a diverse selection of call centers over the last 10 years, including Prime Therapeutics and Paychex (ePlan Services). Lisa has over 15 years of call center and customer service experience. In addition, she has an MBA, served on the Board of Directors for CSAE and has been a judge for the Stevie Awards since 2010.



NATHALIE LAROUCHE
Senior Director, Sales Effectiveness-Consumer Market
Cogeco

Nathalie Larouche is Senior Director, Sales Effectiveness-Consumer Market for Cogeco Connexion, the second largest cable operator in the Canadian provinces of Ontario and Quebec in terms of basic cable service customers served. She is responsible for Sales Channel Strategy, Training and Development, Project Management and Work Force Management.

Nathalie joined Cogeco Connexion in 1998. Prior to being appointed to her current role, she held various positions and acquired a solid understanding of the call centre, most notably as Director of the Call Centre where she was successful in implementing numerous process improvement initiatives. In 2013, she moved to the position of Director of Sales and Operations. With the company's goal of driving sales while ensuring customer service remained at the forefront of all interactions, Nathalie's role was expanded in 2014 to Senior Director, which saw her take on additional sales channels across both provinces (Storefronts, Web Sales and Outbound Telemarketing).



GABRIELLA MARRONE
Customer Experience Manager
Accenture

Gabriella Marrone is the Customer Experience Manager for Enbridge. In addition to this role, she is the site delivery lead for a 400 seat call center in Ontario, Canada. Gabriella has been with Accenture for 18 years. She started her career as a Customer Service Representative in 1998, and has held numerous roles in Operations through the years. She has been a Trainer, Quality Assurance lead, Team Manager and has been involved in numerous projects around call center delivery.



MARY MURCOTT

President of the Customer Experience Institute Dialog Direct

Mary Murcott currently serves as President of the Customer Experience Institute for Dialog Direct, a direct marketing services, technology and customer engagement center outsourcing company. Previously, Murcott founded an international consulting company servicing Fortune 100 companies. She also served as CEO of NOVO 1, SVP & CIO of Budget Rent-a-Car and Ryder Trucks, and SVP of American Express and DHL Worldwide Express. She has over 30 years transforming traditional call centers into engagement centers.



ANNE PALMERINE

Vice President of Customer Engagement and Enrollment Services UPMC Health Plan

Anne Palmerine is the Associate Vice President of Customer Engagement and Enrollment Services for UPMC Health Plan. Anne has led UPMC Health Plan in Customer Service for the past fourteen years, including Enrollment and Retail. Accomplishments have included implementation of a highly esteemed Health Care Concierge program, implementation of Genesys call center technology, driving first call resolution and service recovery, integration of an omnichannel experience, and achieving JD Power Call Center Certification in 2009, 2011, 2012 and 2014. Achievements have included from ICMI, 2015 Best Large Contact Center, from Stevie Awards, 2015 Contact Center of the Year (Over 100 Seats) and from IQPC, Best in Class Contact Center (Over 200 Seats). Anne has managed in customer service call centers for the past 24 years with a focus on customer retention, growth, and sales. She has a bachelor's degree from West Virginia University and an MBA from the University of Pittsburgh.



MATT SCHRICKER

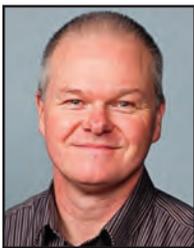
Multi-Channel Manager Blue Cross Blue Shield of Massachusetts

Matt Schricker began his contact center career as a CSR with Harvard Pilgrim Health Care. Shortly thereafter he took his first leadership role as a call center supervisor where he was responsible for several customer groups with performance guarantees. After a brief stint in the project world, working on Harvard Pilgrim's Medicare Advantage plan, Matt accepted his current role with Blue Cross Blue Shield of Massachusetts. Some of Matt's achievements as the Manager of Multi-Channel include helping to design a new quality program that blends business needs with voice of the customer survey results as well as creating a new service model for Blue Cross Blue Shield of Massachusetts' internal support hotline. Matt has a passion for customer experience, staff development and the future of Omni-Channel.



RACHEL STUCHBERRY
Eastern Canada Operations Lead
Accenture

Rachel Stuchberry is the Eastern Canada Operations Lead for Accenture. In addition to this role, she has been responsible for Client Service Delivery for the Enbridge Gas Distribution Account, in Ontario, Canada for the past three years. Rachel will be celebrating her 20 year anniversary with Accenture this year. She started her career as a Customer Service Representative in 1996, and spent several years in Operations. Rachel moved into Recruiting and worked with Hirefx to introduce the innovative recruitment process for Accenture's Customer Service Representatives in 2001. After spending several years in Recruiting, Rachel moved into Human Resources as the HR lead for Accenture Business Services for Utilities. Rachel subsequently became the Human Capital and Diversity Manager in Canada and then returned back to Human Resources as the North America Talent Supply Chain Manager for Operations. Rachel lives in St. Catharines, Ontario with her husband Paul and two daughters, Megan and Kate.



SCOTT WEBB
Manager, Customer Programs and Research
FortisBC

With nearly three decades of experience at Fortis, Scott has seen a lot of change. He's often been at the forefront of pivotal communication activities that drive consumer awareness about the company and help shape the way they feel about FortisBC. For example, he managed the customer communication and website development activities that led the company through two of three name changes; he oversaw the company's largest advertising campaign when it rolled out third-party natural gas service to British Columbians. And he's seen the utility industry in general make huge strides in both the understanding of, and attention to customer experience.



TRICIA WILL
Contact Center Operations Manager
Vision Service Plan

Tricia Will joined VSP in 1997. She graduated from Sonoma State University with a BA in Psychology. She began her career at VSP as a Customer Service Representative and within a year moved to the team responsible for contact center operations support. Within that team she began to amass her understanding of contact center technologies and best practices. Over the years she helped develop, implement, and support a variety of call center applications across VSP's global enterprise including Aspect ACD, Report Writer/Runner, Envision, eGain, Cisco UCCE, Cisco CAD, VIM, and Verint.



JODI WINDHORST
Vice President of Customer Service Experience
Nationstar Mortgage

Jody Windhorst is Vice President of Customer Service Experience at Nationstar Mortgage. Jody has helped lead Nationstar through their First Call Resolution journey, which includes improving their First Call Resolution by 5% or more for the past 3 years. Additionally they won the SQM Group's 2015 Best Practice Award for CSR Coaching. Jody joined Nationstar Mortgage in 2012 and was previously with another mortgage servicer for 8 years. Jody is also active in her community, serving on various nonprofit board of directors.

VSP® VISION CARE CONTACT CENTER OF THE YEAR!



Congratulations to all of the exceptional contact centers and individuals that have earned SQM recognition. VSP Global® is proud of the insights gained through our 14-year partnership with SQM, which has helped our contact centers sustain their world class reputation, supporting our mission to help people see.



2015 Awards

- **Contact Center of the Year** (VSP Vision Care)
- **Contact Center World Class Certification** (VSP Vision Care, Marchon®)
- **Highest Customer Service – Insurance Industry** (VSP Vision Care)
- **Highest Customer Service – Business to Business Sector** (VSP Vision Care, Marchon)
- **Most Improved Employee Satisfaction** (VSP Vision Care)
- **Highest Employee Satisfaction – Insurance Industry** (VSP Vision Care)
- **World Class Employee Satisfaction** (VSP Vision Care)
- **IVR Channel Contact Center Best Practice** (VSP Vision Care)
- **CSR Training Program Contact Center Best Practice** (VSP Vision Care)

CONGRATULATIONS

Carol Elder, finalist for
CSR of the Year!

Jennifer Riggle, finalist for
Supervisor of the Year!

Kirk Chase and Irene Dent
recognized for World Class
Improvement!

Contact Center of the Year:
VSP VISION CARE

VSP Global® helps more than 77 million people see better by providing affordable, accessible, high-quality eye care and eyewear. VSP's complementary businesses combine superior eye care insurance, high-fashion frames, customized lenses, ophthalmic technology and retail solutions. VSP Global businesses, operating in 100 countries in the U.S., Australia, United Kingdom, and Ireland, include VSP Vision Care, Marchon® Eyewear Inc., Eyefinity®, VSP Optics Group and VSP Omni-Channel Solutions. As a not-for-profit business, we are committed to bringing vision to those who can't come to us, and to reimagining how eye care and eyewear are delivered globally.

To maintain our leading position in the market place, we must offer flexible products and services at competitive rates. Providing a world class service experience to attract and retain customers is critical. Our high first call resolution rate demonstrates how we deliver service both effectively

and efficiently. It also helps us to manage our costs, which benefits our entire organization, and, ultimately, our customers. We maintain a work environment for our staff that is positive and productive. Handling fewer repeat calls is good for our customers, our employees and the company.

*To maintain our leading
 position in the market place,
 we must offer flexible products
 and services at competitive rates.*

VSP has improved FCR rates incrementally for the last five years. This steady improvement comes from a strong focus on our member's experience through regular and ongoing feedback. We've integrated the voice of the customer in our key performance metrics at all levels of the call center. We celebrate our successes with our employees, especially World Class certification. For 2015, 94

percent of eligible customer service representatives have been certified World Class by SQM.

FCR is one of the top goals used to measure our success. It starts when we talk with our newly hired CSRs about the importance of call resolution and the role they play in helping achieve our target. We keep it simple. Our CSRs are empowered to solve virtually any customer issue. In fact, new employees frequently cite this as something they appreciate. We provide them with the tools, training and support to take care of our customers. Based on employee feedback, we are in the first-quartile ranking for employee satisfaction with our policies and business practices.

We have a highly dedicated team that believes in their ability to make a difference by helping people see. They are continuously seeking ways to improve their own performance and the customer experience.

Best Performing Small- to Mid-Size Contact Center: BLUECROSS BLUESHIELD OF VERMONT

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

Fostering a member experience corporate culture through training:

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

Customer Service new hire training:

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

center, providing an exceptional member experience and ensuring their call is accurately and thoroughly resolved.

Call handling practices:

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

Our commitment to the member experience is engrained in our culture...

Coaching:

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

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

AWARD-WINNING STORIES FROM THE FRONTLINE FOR CSR OF THE YEAR

THIS ONE WAS SPECIAL

“By Pam identifying the root cause of the member’s issue and enlisting the assistance of other departments, this helped address the needs of the customer and may have saved the member’s life.”

Pam received a call from a member one day seeking assistance with her prescription refill. This wasn’t just any member or your regular pharmacy refill, this one was special. As Pam engaged in the call and read the previous notes, she realized this member had called in before and her Prior Authorization (PA) issue had not been resolved. The member stated she was on two waiting lists for a kidney transplant, so not having her medication could be a matter of life or death for her. The member explained that having the medication allows her to maintain normal hemoglobin levels, which allow her to be transplant-eligible. When her lab work was submitted with the Prior Authorization (PA) request, the PA was denied, stating the member did not need the medication if her levels were normal. However, without the medication, she cannot maintain normal levels.

One of the critical aspects of this situation is, without normal hemoglobin levels, the member is not eligible for a transplant. Once the hemoglobin levels drop, it takes two months of uninterrupted medication for levels to return to the point where she can be transplant-eligible again.

Pam escalated the issue to an internal unit, and the manager immediately put his team in motion to offer assistance based on Pam’s detailed information regarding the customer’s issue. She

wanted to do all she could to avoid having the member visit the ER. Pam remained in constant contact with the member keeping her informed of any updates to her case. Marketplace contacted the provider to initiate the authorization for the medication. By escalating the issue, Pam was able to get the PA transferred from the member’s old policy to her new policy and also arranged for an emergency overnight delivery of the medication. The medication was approved for 12 weeks and Pam ensured the medication was overnighted to the customer.

Although Pam was relieved that the member had received the overnight delivery and had been approved for 12 weeks, she was still not completely satisfied. Pam felt like this was a temporary fix, so she continued probing, asking: What can be done to prevent the same issue from occurring after the 12 weeks? Is Case Management or some other resource available for this member? What are our options? What can I advise the member? Pam realized the root cause of this issue was going to continue to be a problem as long as the member’s labs look normal and she does not get approved for her medication, which also makes her ineligible for a transplant. So, Pam took the initiative to dig deeper.

As Pam continued probing to her management and other internal areas, this sparked much attention internally

to assist the member. The provider was then contacted and it was learned the criteria had changed for the PA, which was great news for the member. In addition, it was found that the member was not showing on the exchange transplant list and notified Case Management. Case Management determined the member had not been pre-certified which prompted them to reach out to the facilities that the member indicated she was on the waiting list for and assisted with the precertification. The member is now showing on the transplant list for four facilities. In addition, the member has been assigned to a case manager for follow-up. Pam contacts the member regularly to follow up as well and ensure her needs are being met.

By Pam identifying the root cause of the member’s issue and enlisting the assistance of other departments, this helped address the needs of the customer and may have saved the member’s life. Based on Pam’s actions, a new procedure has been developed to be more proactive in these types of cases and ensure the customers receive their specialty medications in a timely manner.

—Pamela Cragin

BlueCross and BlueShield of South Carolina

AWARD-WINNING STORIES FROM THE FRONTLINE FOR CSR OF THE YEAR

FINDING A SOLUTION

“In well under ten minutes this member’s experience had gone from being unpleasant to extremely satisfied.”

I took a call in late summer of 2015 from a member that I could immediately tell was extremely upset by the tone of her voice. I knew right away I would have to do everything I could to change this by the time I was finished with the call.

When I asked how I could help her she explained to me she had been trying to make an online claim submission for a few days now and that this was her third time calling for assistance in how to do so. I asked her which step she was having difficulties with and she told me that once she got to the last step of submitting the claim there was an error message that stated she must submit her claim by mail. The reason she was so upset by this point was because during her first two calls she was assured she would be able to use the member website for her claim and would not have to mail it to us. It was a rather expensive drug and she needed the money back as quickly as possible.

I told her I would help her resolve her problem and see why the error was happening. I confirmed online claim submission for drugs were in fact available for her plan. I requested the Drug Identification Number for the medication she wished to submit. I took down this number and started searching through Siebel to see if there was anything in particular to it that would prevent an online claim submission.

Once I had searched the drug in Siebel, the expense code came to INJ00 (injectable drug). I knew I had

previously seen a note in our Knowledge Management tool (KM) about this expense code and was able to find exactly what I was looking for. The KM stated “INJ00 cannot be submitted online, and must be submitted by mail” which explained why she was getting the error message.

I informed the member of my findings and apologized for the fact she was told differently on previous

“I knew right away I would have to do everything I could to change this by the time I was finished with the call.”

Stephanie Motovsky

calls. However, she was still upset that she had spent so much time that entire week trying to submit the claim because she thought she was the one doing something incorrectly to cause the error. I apologized again for the misinformation but I could tell she was dissatisfied. I knew I had to come up with another option and asked her to allow me some more time to see if there was something else I could offer to make her experience a better one.

I started searching and recalled seeing a post on the Customer Call Center Homepage under “Knowledge for you” about Digital Image Capturing that had started early July 2015. I located the past post and read the facts about it, and discovered that claims such as Injections that cannot be submitted on a computer, can be submitted taking a

picture using the smart phone app. I went back to the member, asked if she had a smart phone, and if so what kind. She informed me that she has an Apple iPhone. This was perfect! The Digital Image Capturing was only available to iPhones at that time. I was so relieved that I now had the best option for her and she sounded excited too when I told her I found something to resolve her problem. I told her that if she did not already have our Sun Life mobile app that she would need to download it from the App Store. She had questions about the login information required and I assured her it was the same as the member website.

By the time I had finished explaining how to submit the claim, from which option to choose to how it will ask for a picture of her receipt, her tone and feelings towards the situation had completely changed. She told me she couldn’t thank me enough for not only figuring out why she was getting errors but for finding a solution that made her claim submitting experience an even simpler and faster one.

In well under ten minutes this member’s experience had gone from being unpleasant to extremely satisfied. I was not only proud of myself with how professionally I handled and helped this caller, but I knew that I was making a difference in the Group Benefits Call Center.

—Stephanie Motovsky
Sun Life Financial

AWARD-WINNING STORIES FROM THE FRONTLINE FOR CSR OF THE YEAR

EMPATHIZING AND THINKING OUTSIDE THE BOX

“Our client was thrilled that I was able to save a longtime Cardholder and that I even cross-sold the retail channel and their cell phone provider services to her – all in an empathetic, caring, and helpful way.”

As a Level 4 agent on one of our credit card programs, on a daily basis I deal with a wide variety of Cardholder matters; everything from declined cards to issues with accessing the online website for self-service.

Since I joined the Millennium1 Solutions family, I have often had the opportunity to sit side-by-side with our client stakeholders so they can listen to my calls. On one specific occasion, one of our clients spent the majority of a day listening to my calls. Most of them were what I would categorize as standard calls such as balance inquiries, assistance accessing our online website and many other general inquiries. The last call of my shift, however, was quite different.

The last call I had that day was unfortunately a very upset Cardholder. She was a long time Cardholder and was expecting a transaction to appear on her account that was for her sons' post-secondary tuition. It was apparently a rather last minute payment, and it was critical that it be processed successfully or her son risked losing his seat in the post-secondary institute he had planned on attending. She further explained how hard he worked for his seat and that due to his dedication and hard work, she wanted to make sure that the payment successfully went through.

The complexity in this situation was her available credit as unfortunately, she did not have the available credit needed on her account to cover the tuition payment. She was so upset

that she was fully prepared to close her account and explore her options with other credit card companies. This situation meant a lot to me as I was going through enrolment of my own eldest daughter in her post-secondary studies at that time. I wanted to do everything humanly possible to assist her and I was targeting a win-win with her son successfully enrolled in school, and her business retained for our client. Since

“I really wanted to be able to help her and to avoid the need for her to go elsewhere to obtain the credit she needed...”

Trina Hardiman

I was currently going through the post-secondary enrolment situation myself, it was easy for me to understand her feelings and empathize naturally. This seemed to make her feel better about the situation and kept her calm while I looked into her account and explored options. I needed to investigate more deeply, so I placed her on a brief hold while I looked over her account to see what options were available. As I was reviewing her account, I noticed that the transaction had already been posted and declined as she did not have sufficient available credit on her account. It was very unfortunate as she was only a few hundred dollars short of the amount she required for the tuition

payment.

I really wanted to be able to help her and to avoid the need for her to go elsewhere to obtain the credit she needed in order to have the transaction processed successfully. After looking further into the account, I found a credit limit increase offer that she qualified for. I returned to the Cardholder and I explained to her that I could increase her credit limit for her immediately and that it would not require a credit check. She was thrilled with the news because not only was it enough to cover the cost of tuition, but it would also cover the costs of books and additional items he would need.

This call was emotionally charged as during our interaction, the Cardholder also shared with me that her husband had recently passed away and along with battling grief; she was also battling breast cancer at the same time. This was one extra stressor that she really didn't need. I was so happy to be able to assist in this small way given all she was going through. She informed me that now all of her business would go to our client's credit card and she will be spreading nothing but positive comments regarding our customer service.

As I was processing the credit limit increase, the Cardholder made a comment about how she wished her cell phone provider was as reliable and helpful as we are. I immediately thought about our other channels and referred her to our client's nearest retail store so

Cont'd on page 28

AWARD-WINNING STORIES FROM THE FRONTLINE FOR CSR OF THE YEAR

Cont'd from page 27

that she could explore our cell phone provider services. She had absolutely no idea that our client offered those services and she expressed how happy she was that I took the extra time to provide her with the suggestion. She was ecstatic! She even took the time to say she knew that the call was likely being recorded and that she hoped that my supervisor listens and gives me a raise - to which we both laughed and then ended the call with a smile.

As I had the pleasure of having one of our client contacts sitting with me during this call, I had the added benefit of receiving real-time feedback. Our client was thrilled that I was able to save a longtime Cardholder and that I even cross-sold the retail channel and their cell phone provider services to her – all in an empathetic, caring, and helpful way.

This call has always stuck with me. In addition to my Agent role, I also serve as an Agent Trainer assisting our newest team members excel. I have recently used this call as an example in the classroom. I encourage them to smile on the phone. It's a simple tactic that truly works. Not only does it provide happiness to the Cardholder but it will also provide you the same happiness. You should always take the extra time to treat the Cardholder with the same respect you would want from others. Take the time to put yourself in their shoes, it will benefit you and your ability to provide exceptional customer service in the end. Taking the time to listen to a Cardholder's story will always be beneficial – especially when we know they are upset and frustrated - taking the time to find out why and connect on a human level really matters.

—Trina Hardiman

Millennium1 Solutions

I DO IT WITH MY HEART

“I did not leave her alone on the phone because I felt the need to treat her like my own grandmother, and she was counting on me.”

How do I even begin to explain world class customer service? I can say a lot of words about world class customer service. I can use a bunch of adjectives to explain what it really means, but with so many organizations focused on the same thing, I began asking myself “What really is world class customer service?”. All I know is, I come in to the office every day, set up my tools, have a few laughs with my friends at work, log in, and start answering calls. Every one of us does this job every day, but how am I different from the rest?

In our industry, we throw around phrases like “customer intimacy” and “customer-centricity”. We use words like “delight” and “exceed”, but are those enough to be able to see if I have provided world class customer service? Imagine you're an employee being asked to deliver a “world-class customer experience”. Where would you start? What would you do? Would you try to “delight”? Get “intimate”? Solve their problem? How do you do that? What I know is, when I log in to the phones each morning and start answering calls, I do it with my heart.

When I first started taking calls I had many challenges. My product knowledge was poor, I wasn't comfortable using the tools I needed to do the job, but one thing I always had from the beginning was that I knew how to talk to people, and I put my heart into each call I took. I cannot remember all the calls I received since I started working in the industry, but among all the thousands and thousands of calls I took in my entire life in this industry, there was one call that stands out. To this day, it is something that remains in my mind and in my heart.

It was a Saturday night shift when all my friends were out partying, but I'm in the office working when my phone beeped. I delivered my opening spiel, and I heard a hysterical, crying voice of a helpless old woman on the other end. She said she received a foreclosure letter from Nationstar. I had a lot of things swimming in my head to tell her, but I held up and let her vent.

She was crying all along and was having difficulty breathing, which I would probably also feel if I was in her shoes. She was in a desperate situation, all alone, thinking that nobody can help her out. After an emotional outpour that lasted several minutes, she paused, probably to catch her breath, and there was a moment of silence. I could still hear her sobbing.

I opened my mouth and gently uttered, “I am here to help you, but before we get started, I need you do to me a little favor, is that okay with you?” She said “Yes, what is it?” I politely said, “Can you please get yourself a glass of water first and drink before we start resolving your issue?” She said, “Okay, give me a minute” in a trembling voice.

AWARD-WINNING STORIES FROM THE FRONTLINE FOR CSR OF THE YEAR

From that moment on, I knew that I got her to trust me, and that I could help her with her ordeal. We discussed her situation. I did what I had to do. I had to talk to another department to get her a payment plan and we eventually resolved her issue. I did not leave her alone on the phone because I felt the need to treat her like my own grandmother, and she was counting on me. I didn't want to let her down. She was relieved and very thankful. She

*"I knew how to talk
to people, and
I put my heart into
each call I took."*

Russel Valendo

even complimented me for what I did for her, which I appreciated, even if my manager did not hear it, but the part where I was deeply touched was when she said, "Thank you for your help. You are an angel."

To this day, I always strive to get the same kind of reaction from my customers when they need me. The recognition from my manager/company is appreciated, but the feeling I get in my heart when I help someone is the most valuable reward to me. It feels good to truly help someone that needs it.

—**Russel Valendo**
Nationstar Mortgage

YOU CHANGED MY SON'S LIFE

"You encouraged us to tell our story..."

It was a typical day in the call center until I got a call transferred to me. It was a member that I had previously assisted. Thinking back to that call, I had considered it just a typical call, educating a customer on their benefits and rights. That is what we do. That was until I got this call and the member says, "you changed my son's life". It was then I realized it's not always the difficult cases that we can make the biggest difference to our customers, but sometimes the calls we think are easy, remind us that our knowledge in what we do, and what we share, can change a person's life. That's the story I want to share.

I received a call from a Dad, calling about his young son with a hearing impairment. He was asking why we weren't paying his son's speech therapy claims. I researched the claims we had on file and let him know that we didn't have any claims on file for speech therapy. I reassured him that I would outreach to the speech therapist on his behalf and ask that they submit the claims. When talking to the therapist she explained that she hadn't submitted any of the claims because she knows it's something that's not covered by insurance as it falls under "developmental delays", a service the schools provide. As we discussed the claims, the therapist shared that she felt that speech therapy for hearing loss should not fall into this category as the child's speech therapy was for hearing loss, not for developmental delays, and that schools don't have enough

support for children with hearing loss in Vermont. They are not getting the help and education they need in this area.

I have a friend who just went through this with her own hearing impaired son and she had to move out of state to get him a proper education, so I understood what she and the family were going through. I requested that the therapist send all the claims into us, allow them to deny, as this would give the family the opportunity to file an appeal and will allow them to tell their personal story. I also advised her that she can request a benefit exception, asking the Plan to review future visits for eligibility.

I then called the family back, explained my conversation with the provider, and advised what the next steps would be in the process. I explained that when they filed the appeal, they would want to be specific on their personal struggles and the lack of support for the deaf community in Vermont schools. I advised to include how they felt that his speech therapy is for hearing loss and shouldn't be viewed as a developmental delay, but instead eligible under his medical benefits. The family thanked me for my help and said they were glad I could relate to what they were going through and at that time, I thought that was the last I would hear from them.

When they called me and said, "We just wanted to call you and thank you for what you did for our family. You

Cont'd on page 30

AWARD-WINNING STORIES FROM THE FRONTLINE FOR CSR OF THE YEAR

Cont'd from page 29

encouraged us to tell our story, because of you we were not only approved for 30 speech therapy visits this year but BlueCross BlueShield of Vermont has allowed his claims from last year too. We are so grateful for your knowledge and understanding of what we were faced with. We feel so fortunate that we got you on the phone that day,

you changed our son's life." The member then requested to speak to my supervisor and told her that she "was amazed to call an insurance company and speak to a representative that she felt really cared about her family, and was on their side." This compliment actually brought tears to my eyes. By putting myself in my customer's shoes, showing empathy, sharing knowledge,

and clearly explaining their options, I had made a positive difference in this family's life and this was a great reminder of the importance of the work that we do.

—Amy Duhamel

BlueCross BlueShield of Vermont

THE LAST CHRISTMAS WITH HIS FATHER

"Assisting him made me realize that all calls allow us to make personal emotional connections..."

The customer called to change a flight booking he made online with Air Canada in October for a Christmas family re-union in Kelowna.

His father suddenly took ill and was given just a few days to live a week before his scheduled departure date. It had been a couple of years since he had seen his father and five siblings. Realizing heartbreakingly, that this would be the last Christmas with his father, he felt it was imperative to leave as quickly as possible to spend whatever time he could with his whole family, and was willing to make the changes required at any cost.

As I was listening to the customer speaking, memories of my mum's death flooded my mind. My youngest brother could not get a flight out of the UK during Christmas to attend mum's funeral. Until today, this is still his biggest regret, and it took him a very long time to get closure. I felt his anticipatory grief leading to the ultimate loss of his father. At this point, I knew it was absolutely essential to fulfil his request as the impact and regrets would last forever if he was unable to

see and be with his father one last time.

While accessing the details of his ticket, my immediate response was to empathize and reassure him that we would find a solution. At first glance, I knew the situation was far more challenging than I thought, given that he was from Edmonton where inclement weather was an issue. Additionally, it was the busiest time of the year with limited flight availability. After several attempts to book a flight with no success, I realized an immediate resolution was impossible. I offered to call him back in 2-3 hours, as I did not have the heart to add any more bad news to his already trying day. I confirmed preferred dates for travel, timing, flexibility, stop overs and routing. Taking ownership, I reassured him once again that I would do my utmost to get him a flight. Feeling desolate and defeated, he allowed me to use my discretion to do whatever was necessary to get to Kelowna.

Empowered and determined to find a flight for him, I mapped out all the possible routes, called Air Canada several times and even went as far as searching for a new ticket with another

airline. All these attempts failed, yet I was unwilling to give up. Using all my experience, knowledge and tools, I got creative with the routing. It would require him to change airplanes in Calgary and Vancouver to get to Kelowna in time. After confirming flight times and requirements, I was elated that I had a resolution. Keeping my promise to him, I called him back and shared the wonderful news. He was overwhelmed and full of gratitude.

After the call, he left a message and said, "Nazreen was simply outstanding. She was compassionate, kind and absolutely provided remarkable customer service. Thank you."

Assisting him made me realize that all calls allow us to make personal emotional connections, and sometimes, the ability to do something so profound it stays forever. This journey was a defining moment in his life and being part of it with LoyaltyOne was a privilege and honor.

—Nazreen Abdulla

LoyaltyOne

MEET IMPORTANT INDUSTRY VENDORS

This year SQM has assembled a great group of vendors who will assist you in improving your OCR and FCR. We invite you to visit them on Wednesday and Thursday when they will have booths where breakfast, coffee, and lunch is served for the Management Track. These great industry contributors were recommended by our client base or who we have worked with.

Here's who is joining us this year and why they're worth meeting.



As a valued outsourced partner to Prime Therapeutics, Dialog Direct and Prime Therapeutics are winners of our **CSR Training Program Best Practice Award**. In a tightening labor market, Dialog Direct was able to increase FCR for Prime Therapeutics by 7%. Their approach includes ten unique training-related best practices.



Voci has state-of-the-art language technologies and solutions from speech transcription to conversation analysis. Voci has a reputation for being very fast and very flexible to the business goal you are trying to achieve with speech technology – call center, voice analytics, litigation support or visual voicemail.



Ulysses Learning was recognized by SQM with the **Best Vendor Customer Solution Award** because of the sheer number of unsolicited mentions by mutual clients as to the value of their services. Their focus is to help you provide better coaching and service training.



As a valued outsourced partner to many of our clients, M1S are the winners of our **Quality Assurance Best Practice Award**. They marry their QA assessment to the surveyed call for the vast majority of their client base. As such they bring abroad experience of how to adopt this best practice in many different industries.



InfiniteKM specializes in providing a knowledge management tool that helps your CSRs deliver a consistent customer experience at all touchpoints. They have unique modules for sales, compliance, analytics, and more. And they integrate with the leading CRM tools.



Nuance's partnership with VSP Vision Care helped VSP win our **IVR Self-Service Channel Best Practice Award** this year and we are very pleased that Nuance is here to share the technical innovations they bring to IVR functionality.



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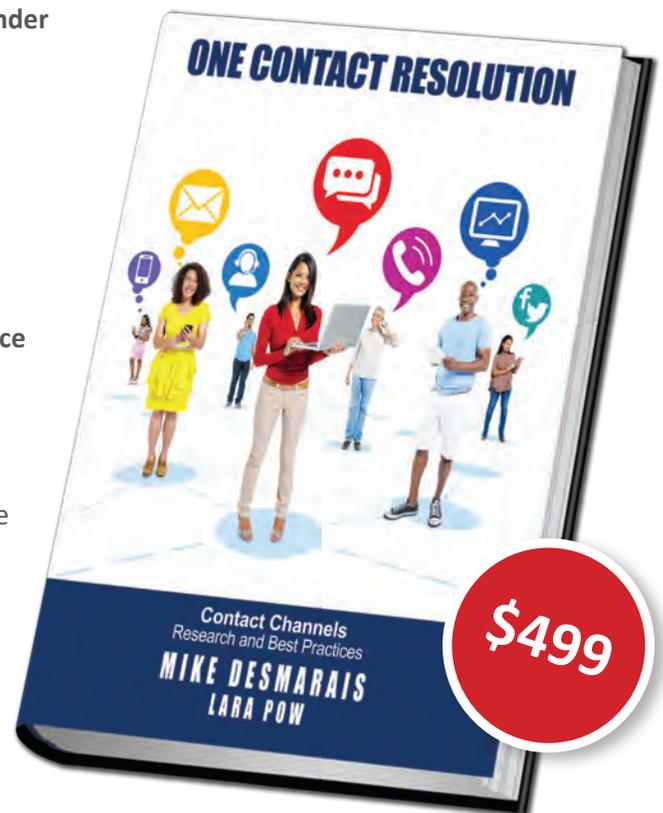
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