



OFFICIAL AWARDS GUIDE | 2012





WE TALK A BIG GAME

Capital One® is thrilled to announce that our Retail Bank Call Centers have been recognized with two SQM awards.

CALL CENTER WORLD CLASS CERTIFICATION

Top 5% of SQM's database of 450+ call centers.

FIRST CALL RESOLUTION IMPROVEMENT AWARD

5% or greater annual first call resolution improvement within the last two years.

Congratulations to all of our Associates who made the right call!





TELUS Sourcing Solutions

We did it together.

Congratulations to the TELUS Sourcing Solutions team who consistently strive to encourage, develop and maintain outstanding levels of team member engagement.

It's because of you that we are honoured to be recognized with:

- Highest Employee Satisfaction for Outsourcer Industry
- World Class Employee Satisfaction
- Best Performing (Small/Mid Size) Call Center Award Finalist

Thank you for embracing new ideas that make our customers' experience better, everyday.

telussourcingsolutions.com



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LETTER FROM SQM'S PRESIDENT & FOUNDER

SQM's 14th Annual Most Prestigious North American Call Center Industry 2012 Awards for Service Quality Excellence Program



THANK YOU for choosing to attend SQM's **14th ANNUAL MOST PRESTIGIOUS NORTH AMERICAN CALL CENTER INDUSTRY 2012 AWARDS** for Service Quality Excellence. As a result of benchmarking more than 450 call centers and surveying over 1 million customers and 25,000 CSRs on an annual basis, SQM is pleased to announce our 2012 award-winning call centers and frontline employees.

At this year's awards ceremony, we will recognize 41 organizations with 40 different awards, including Call Center of the Year, World Class Certification, First Call Resolution (FCR) Improvement, Highest Employee Satisfaction (Esat) and Highest Customer Service.

This year, we will recognize the Top 11 World Class CSRs Finalists who are the "best of the best" Certified World Class CSRs, and from those 11 CSRs, we will announce the 2012 CSR of the Year. The CSR of the Year will be given \$500 in cash at the awards ceremony. SQM will also recognize the Top 10 World Class Call CSR Improvement Winners for 2012.

Also, we will be recognizing the Top 6 World Class Supervisors who are the "best of the best" Certified World Class Supervisors, and from those 6 Supervisors, we will announce the 2012 Supervisor of the Year. The Supervisor of the Year also will be given \$500 in cash at the awards ceremony. We believe that Supervisors are a key ingredient to creating World Class FCR, Esat and Csat call center performance. SQM will also recognize the Top 5 World Class Call Supervisor Improvement Winners for 2012.

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,

Mike Desmarais
President & Founder | SQM Group



LETTER FROM THE PUBLISHER

Dear Award Recipients and Guests,



CONTACT CENTER PIPELINE is pleased to be the media partner with SQM in putting together this award program to honor you! It takes hard work and dedication to achieve this success for yourself and your organization. Congratulations!

One of the things I enjoy most about working in the contact center industry is that we have the opportunity every day to make a difference in someone's life. Many times, we don't fully realize the impact that we have or we consider the service that our contact center provides as normal, maybe even mundane. It isn't until we talk with our customers that we understand the value of what our centers do, day in and day out, and the small differences we can make by answering questions, fixing problems and helping people.

For me, that's what makes the SQM awards noteworthy: It's your customers rating your service and your operations. What could be more important than that? The people and centers who are honored and celebrated at this awards event set a high standard for what it means to be "world class" in our contact center industry.

Congratulations!

Warm regards,

A handwritten signature in black ink, appearing to read "Linda Harden". The signature is fluid and cursive, with the first and last names being more prominent.

Linda Harden
Publisher | **Contact Center Pipeline**

Contact Center
pipeline

We're Excited!



CHEP is thrilled to be among the Best Performing Call Center Award finalists and recipient of the World Class Employee Satisfaction Award.

As the industry leader in managed pallet pooling products and services, CHEP provides tailored solutions to a number of industries to meet the unique business requirements of our customers. Using innovative technology, decades of experience and an unmatched asset base, CHEP offers outstanding, environmentally sustainable logistics solutions to customers to help protect their products and bring value beyond the supply chain.

One quality experience at a time.



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CALL CENTER OF THE YEAR AWARD

FINALISTS



CANADIAN TIRE FINANCIAL SERVICES (CRCC)



VSP VISION CARE (CALIFORNIA)



AMEX CANADA, INC.

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

CUSTOMER SATISFACTION & FIRST CALL RESOLUTION AWARDS

HIGHEST CUSTOMER SATISFACTION FOR THE CALL CENTER INDUSTRY AWARDS

THE CRITERIA:

¹ This award recognizes the call center with the highest customer satisfaction (top box response) rating for selling approach.

² This award recognizes the call center with the highest overall customer satisfaction (top box response) rating for a self-serve IVR.

³ This award recognizes the call center with the highest IVR navigation to the right CSR the first time.

ORGANIZATION

- U.S. Bank – 24 Hour Banking
- TD Canada Trust / TD Bank AMCB
- HealthNow New York, Inc.

AWARD

- Best Selling Customer Satisfaction¹
- Highest IVR Customer Satisfaction Self Serve²
- Highest IVR Navigation to the Right CSR³

HIGHEST CUSTOMER SERVICE BY INDUSTRY AWARDS

THE CRITERIA:

Based on having the first call resolution rating for an organization in each specific industry/sector.

ORGANIZATION

- TD Canada Trust
- Jackson
- Amex Canada, Inc.
- VSP Vision Care
- Blue Cross Blue Shield of Kansas
- Seton/Emedco
- FortisBC
- Rogers Business Care
- Insurance Corporation of BC
- Marriott Systems Support Center
- Ontario 211
- VSP Vision Care

INDUSTRY

- Banking
- Financial
- Credit Card
- Insurance
- Health Care
- Retail/Service
- Energy
- Telecommunications/TV
- Union
- Helpdesk
- Government
- Business to Business

FIRST CALL RESOLUTION IMPROVEMENT AWARDS

THE CRITERIA:

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

ORGANIZATION

- Aurora Bank FSB
- Florida Blue
- HMSA Blue Cross Blue Shield of Hawaii
- BlueCross BlueShield of Montana
- Blue Cross & Blue Shield of Rhode Island
- Canadian Tire Financial Services (CTCR)
- Capital One Retail Bank (Royal Ridge – Texas)

- Independence Blue Cross
- MTS Allstream
- Northeast Utilities
- Scotiabank International (Jamaica & Trinidad and Tobago)
- Sun Life Financial (Group Benefits)



BEST PERFORMING (SMALL/MID SIZE) CALL CENTER AWARD

FINALISTS

CANADIAN TIRE FINANCIAL SERVICES (PDG)
CHEP
TELUS SOURCING SOLUTIONS INC.

THE CRITERIA: Criteria used for Best Performing (Small/Mid Size) Call Center (under 100 CSRs) are based on having the highest combined customer FCR and employee overall very satisfied (top box response) rating.

CALL CENTER WORLD CLASS CERTIFICATION

FINALISTS

- | | | |
|--|---|---|
| ▪ Blue Cross of Idaho | ▪ Insurance Corporation of BC
(BEU, Claims & DTVI Divisions) | ▪ Scotiabank International
(Dominican Republic, Jamaica & Trinidad and Tobago) |
| ▪ Blue Cross Blue Shield of Kansas | ▪ Jackson | ▪ Scotiabank Global Implementation and Customer Support |
| ▪ BlueCross BlueShield of Vermont | ▪ Northeast Utilities
(New Hampshire & Connecticut) | ▪ U.S. Bank – 24 Hour Banking |
| ▪ Brother Canada | ▪ Ontario 211 | ▪ Vancity (Member Services) |
| ▪ Canadian Tire Financial Services (PDG) | ▪ Rogers Enterprise Service Delivery | ▪ VSP Vision Care (California & Ohio) |
| ▪ Capital One Retail Bank | ▪ Scotiabank | |
| ▪ D+H Ltd. | ▪ Scotiabank
(Alberta, Ontario & Nova Scotia) | |
| ▪ ENMAX Encompass, Inc. | | |

THE CRITERIA: Criteria used for Call Center World Class Certification are 75% or higher of the calls are at the world class level for 6 months or more in 2012. SQM's world class criteria are based on the customer's call being resolved, the customer is overall very satisfied (top box response) rating with their call center experience and the customer service representative.

EMPLOYEE SATISFACTION AWARDS

HIGHEST EMPLOYEE SATISFACTION FOR THE CALL CENTER INDUSTRY AWARD

ORGANIZATION

- Canadian Tire Financial Services (CRCC)

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

HIGHEST EMPLOYEE SATISFACTION BY INDUSTRY AWARDS

ORGANIZATION

INDUSTRY

- | | |
|---|--------------------|
| ▪ TELUS Small and Medium Business | Telecommunications |
| ▪ Arizona Public Service | Energy |
| ▪ Canadian Tire Financial Services | Banking/Financial |
| ▪ VSP Vision Care | Insurance |
| ▪ Blue Cross Blue Shield of Kansas City | Health Care |
| ▪ TELUS Sourcing Solutions Inc. | Outsourcer |

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

HIGHEST WORK FROM HOME EMPLOYEE SATISFACTION

ORGANIZATION

- Amex Canada, Inc.

THE CRITERIA:
 Based on the highest employee overall very satisfied (top box response) for work from home CSRs

WORLD CLASS EMPLOYEE SATISFACTION AWARDS

ORGANIZATION

- Amex Canada, Inc.
- Arizona Public Service
- Canadian Tire Financial Services (CRCC & PDG)
- CHP
- TD Insurance (New Brunswick)
- TELUS Small and Medium Business
- TELUS Sourcing Solutions Inc.
- VSP Vision Care (California)

THE CRITERIA:
 Based on 45% or higher of employees rate their overall experience of working in the call center as very satisfied (top box response) rating.



SQM'S 14TH ANNUAL MOST PRESTIGIOUS NORTH AMERICAN CALL CENTER INDUSTRY 2012 AWARDS FOR SERVICE QUALITY EXCELLENCE PROGRAM

SQM IS PLEASED TO ANNOUNCE our 2012 award-winning call centers and frontline employees. This is SQM's 14th Annual Most Prestigious North American Call Center Industry Awards for Service Quality Excellence.

SQM benchmarks over 450 leading North American call centers on an annual basis and has been conducting first call resolution (FCR), employee satisfaction (Esat) and customer satisfaction (Csat) benchmarking studies since 1996. On an annual basis, SQM conducts more than 1 million surveys with customers who have called a call center. SQM also conducts over 25,000 surveys annually with employees who work in call centers. Based on our call center benchmarking studies, SQM awards excellence in customer FCR and employee satisfaction for the call center industry. We have recognized leading North American call centers for customer and employee satisfaction since 1998.

For each call center that participated in our customer benchmarking study, SQM completed 400 post-call phone surveys, conducted by SQM's telephone survey representatives. SQM uses an in-depth post-call customer survey approach that consists of both rating questions and follow-up customer feedback questions that can be used to help the call center improve their FCR and Csat performance. SQM's call center awards are based on customers who have used a call center and employees who work in a call center. SQM conducted the benchmarking studies for the period of

October 1, 2011 to September 30, 2012. SQM has 41 different awards that recognize the top-performing call centers.

Criteria used for Call Center of the Year are based on having the highest combined FCR and employee overall very satisfied (top-box response) rating. The Call Center of the Year winner will be announced at SQM's Call Center Industry 2012 Conference on November 16th in Las Vegas.

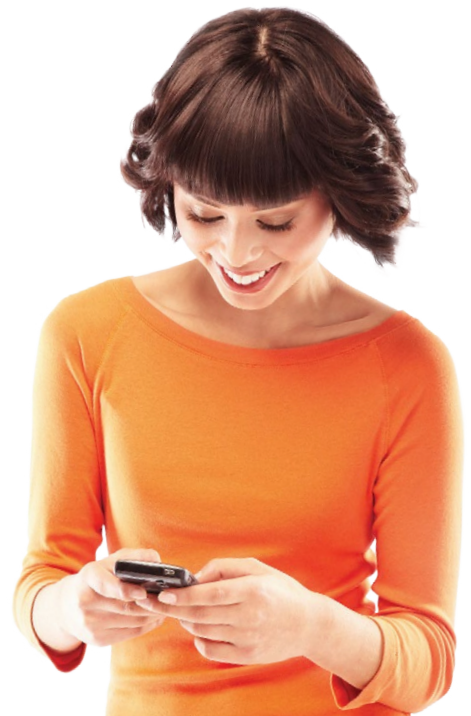
Criteria used for Best Performing (Small/Mid Size) Call Center (under 100 CSRs) are based on having the highest combined customer FCR and employee overall very satisfied (top-box response) rating. The Best Performing (Small/Mid Size) Call Center winner will be announced at SQM's Call Center Industry 2012 Conference on November 16th in Las Vegas.

Criteria used for Call Center World Class Call Certification are based on having 75% or higher of the calls at the world class level for 6 months or more in 2012. SQM's World Class Call criteria are based on the customer's call being resolved, the customer's overall very satisfied (top-box response) rating with their call center experience and the customer service representative.

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

TRANSFORM YOUR CONTACT CENTER WITH VOXEO'S INTELLIGENT, MOBILE-READY CUSTOMER EXPERIENCE PLATFORM

Voxeo improves the customer experience with technology solutions that unify and enhance voice, mobile and social interactions. Companies worldwide work with Voxeo to speed and simplify their migration to a true multi-channel contact center that facilitates increased customer loyalty and cost-saving operational efficiencies.



Ready to learn more?

Contact Voxeo today at 407.418.1800,
solutions@voxeo.com or visit voxeo.com

Ask yourself, can your contact center do this?

- ✓ Deliver Unified Self-Service across voice, text, mobile web and social customer interaction channels
- ✓ Dynamically personalize interactions for faster access to information
- ✓ Improve satisfaction with functionality like speech, location intelligence and proactive outbound notifications
- ✓ Secure sensitive customer information with technologies such as voice biometrics
- ✓ Use cross-channel analytics for a comprehensive view of customer behaviors and application performance
- ✓ Make application updates with unprecedented ease and speed
- ✓ Protect your investment with a 100% standards-based solution and flexible premises and cloud hosting deployment options

SQM AWARDS: 14 YEARS OF CALL CENTER SERVICE QUALITY EXCELLENCE

A Q&A with SQM's President and Founder Mike Desmarais.

WHY ARE THE SQM CALL CENTER EXCELLENCE AWARDS UNIQUE IN THE INDUSTRY?

What makes SQM's awards unique is that the winners are chosen by the customers who have recently contacted a call center and the employees who work in the call center. Specifically, the main criterion for our awards is based on voice of the customer first-call resolution (FCR). To our knowledge, no other organization awards call centers using the voice of the customer FCR as their primary measurement technique.

More than 450 leading North American call centers participate in SQM's award program. The reputations of the organizations that participate is one of the reasons why the award program has become the most prestigious and sought-after recognition in the industry. To compete against these other leading organizations and win an SQM award is considered a distinction and elevates the winning call centers into an elite group of world class service providers.

Throughout the years, clients have told us that they feel it is truly an honor to win these awards because they are based on customer and employee feedback versus merely doing a good job completing an award application. What is also unique about our awards is that we award and certify CSRs, supervisors and call centers that have achieved world-class customer service performance levels.

HOW HAS THE AWARDS OF EXCELLENCE PROGRAM EVOLVED OVER THE PAST 14 YEARS?

We started our award program with only 10 clients in Canada, and have grown the program to include more than 450 leading call centers that we benchmark on an annual basis. In our first five years, we only benchmarked and awarded Canadian call centers. However, in the last seven years, we have expanded our business across North America. Currently, 80% of the companies that we benchmark are from the United States. In previous years, the awards conference had been held in Toronto. This year, we have moved the event to Las Vegas to reflect the growing participation by U.S. organizations.

In addition, we have expanded the awards conference from a humble event of 50 attendees to the premier event that it is today, with around 500 industry professionals in attendance. Approximately 50% of the people who attend are frontline staff who are being recognized with a World Class Customer Service Certification award. It is so exciting to be able to present these outstanding employees with their SQM awards, and to be a part of one of the greatest accomplishments of their careers.

WHAT TYPES OF CHANGES AND/OR PROGRESS HAVE YOU SEEN IN THE ORGANIZATIONS THAT PARTICIPATE?

Call centers that participate in our benchmarking program do so for more reasons than just to win awards. SQM is very proud of the fact that 70% of our clients improve their FCR performance year over year. To our knowledge, we are the most successful consulting firm in the call center industry for helping clients consistently improve their FCR performance. In addition to increased customer satisfaction, enhancing FCR has a substantial impact on the business. For every 1% improvement in FCR, clients save, on average, \$256,000. The organizations that have won our awards proudly advertise those accomplishments to their clients and, as a result, generate more revenue. On an individual level, the World Class FCR performers—from frontline staff to management—are typically offered career advancement opportunities as a result of being certified by SQM.

WHY DOES THE AWARD FOCUS ON FCR AND EMPLOYEE SATISFACTION (ESAT)? WHAT DO THESE TWO METRICS REVEAL ABOUT A CONTACT CENTER'S PERFORMANCE?

FCR is the most important of all the metrics for the call center industry. Most clients correctly believe that there is a correlation between high Esat and High Customer Satisfaction (Csat)/FCR performance. Most call center managers connect to the concept that high Esat can provide high Csat/FCR, but it also goes the other way in that high Csat/FCR can provide high Esat. In fact, FCR is widely considered to be the only key performance metric that provides a balanced view (quality and cost) of a call center's overall performance.

Focusing on FCR will provide a call center with the following five benefits:

1. Reduces operating costs—for every 1% improvement in FCR, a call center reduces its operating costs by 1%
2. Improves Csat—for every 1% improvement in FCR, there is a 1% improvement in Csat
3. Improves Esat—for every 1% improvement in FCR there can be a 1% to 5% improvement in Esat
4. Increases opportunities to sell—when a customer's call is resolved, it increases the customer's cross-selling acceptance rate by up to 20%
5. Reduces customers at risk—only 2% of customers who have their call resolved on the first call expressed their intent not to continue to use the organization's products and services as a result of their call center experience



First Call Resolution, a new book by Mike Desmarais, provides in-depth insights on defining, calculating and improving FCR, including success stories from previous SQM award winners.


For more information, visit www.sqmgroupp.com

INDEPENDENCE BLUE CROSS SALUTES

IBC's Customer Service Team SQM's 2012 First Call Resolution Improvement Award



ibx.com  



Healthy lives begin with healthy communities.
For more than 70 years, IBC has been committed to strategic corporate
sponsorship of innovative wellness and education programs
designed to improve the well-being of our region.

Call Center of the Year Finalist: **AMEX CANADA**



QUICK FACTS:

CALL CENTER SITE LOCATIONS: Three sites in Ontario: Thunder Bay, Pembroke, Markham

NO. OF FTES: 400

SECTOR: Financial Services

SERVICES PROVIDED: Inbound customer service; email and web service

OPERATING HOURS: 24/7

CHANNELS: Phone, email, web

TYPICAL CALL VOLUME: Approximately 300,000/month

CALL CENTER INSIGHTS:

ON THE ROLE THAT FCR PLAYS IN PROVIDING A QUALITY CUSTOMER EXPERIENCE:

Without FCR, you can't deliver great customer service. Whenever a customer contacts your organization, it's usually because they have a question, concern or a curiosity of some form. Resolving that issue at the first point of contact is the foundation of excellent customer service.

ON FCR IMPROVEMENTS ACHIEVED IN THE PAST 12-24 MONTHS:

We have been able to substantially increase our first-call resolution by equipping our Customer Care Professionals (CCPs) with the right tools to do their jobs. Continuous learning and development to be able to resolve the customers' issues is the key driver.

In addition, our center's goals, which include first-call resolution, as well as our agents' pay-for-performance program and incentives have been absolutely aligned to the voice of the customer.

ON COMMUNICATING FCR GOALS/ PHILOSOPHY TO FRONTLINE STAFF:

With all of our customer experience metrics, we attempt to set aspirational performance levels, which are based on our top-ranking CCPs' performance during a moment in time. For instance, if the top 30% of our staff are able to achieve a certain excellent result or FCR goal, that becomes the aspiration that everybody aims toward.

ON ENABLING EMPLOYEE ENGAGEMENT THROUGH POLICIES, PRACTICES AND PROCEDURES:

Our vision, as an organization, is to be the world's most respected service brand—not *one* of the most, and not just in the credit card industry, but overall. Therefore, everything and anything that we do revolves around the voice of the customer, and the organization—up, down and across the board—is measured on the voice of the customer.

We set a high standard, and we establish aspirational performance levels for our CCPs. Their performance goals are aligned with our vision, and their metrics and incentives are based on our voice of the customer results. For our CCPs, there is very clear connection between the level of service that they provide to our cardmembers and the benefits that they receive in terms of incentives, pay and their site ranking.

KEY STRENGTH OF THE CENTER:

Our CCPs are our brand ambassadors. They act as voice of the customer representatives—they are advocates for the brand and our organization, as well as for our customers, which is key. We engage them regularly for their feedback and to identify opportunities to improve our policies, procedures and systems.

We consider Customer Care to be a noble profession, and we treat it as such. That translates into world class levels of employee retention—we attract the best talent, we retain our best talent, and we reward our best talent accordingly.

These are all factors that drive our employees' passion to serve our customers.



Customers first.

If there's something we put our energies into,
it's our customers

And within the last year, we created 300 new jobs in B.C. to do so. Today, we're celebrating this milestone by congratulating the employees at our new natural gas customer service centres in Prince George and Burnaby for a job very well done. Together, we're delivering the type of service that keeps all our customers right where they belong: first.

Call Center of the Year Finalist: VSP VISION CARE



QUICK FACTS:

CALL CENTER SITE LOCATIONS: California and Ohio

NO. OF FTES: 569

SECTOR: Insurance

SERVICES PROVIDED: Full-service eyecare benefits administration

OPERATING HOURS: Monday through Friday, 5 a.m.-8 p.m. (PST); Saturday, 6 a.m.-5 p.m.

CUSTOMERS: Members, doctors and clients

CHANNELS: Phone, email, web

TYPICAL CALL VOLUME: More than 8 million/year

CALL CENTER INSIGHTS:

ON THE ROLE THAT FCR PLAYS IN PROVIDING A QUALITY CUSTOMER EXPERIENCE:

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 FCR rates demonstrate that we deliver service both effectively and efficiently, and help us to manage our costs, benefitting the entire organization, and ultimately, our customers. It also supports the organization by having a work environment for our staff that is positive and productive. Handling fewer repeat calls is good for our customers, the company and our employees.

ON FCR IMPROVEMENTS ACHIEVED IN THE PAST 12-24 MONTHS:

For our members, VSP has improved FCR rates incrementally for the last five-plus years. This steady improvement came from a strong focus on our member's experience through regular and ongoing feedback. We've integrated the voice of the customer into our overall quality program at all levels of the call center. We celebrate our successes with our employees, especially World Class certification. For 2012, 93% of eligible CSRs have been certified World Class by SQM.

ON COMMUNICATING FCR GOALS/PHILOSOPHY TO FRONTLINE STAFF:

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. Employees at all levels in the call center are responsible for achieving our FCR goal and it is part of our performance objectives.

ON ENABLING EMPLOYEE ENGAGEMENT THROUGH POLICIES, PRACTICES AND PROCEDURES:

We've kept 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.

KEY STRENGTH OF THE CENTER:

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.

We're honored to be a finalist for Call Center of the Year!

VSP® Vision Care extends our congratulations to all the exceptional call centers and individuals earning SQM recognition for 2012.

The insights we've gained through our 11-year partnership with SQM have assisted our call center in sustaining our world class reputation.

- **Call Center World Class Call Certification**
- **Winner for Highest Customer Satisfaction by Industry: Insurance**
- **Winner of Highest Customer Satisfaction: Business to Business**
- **Winner of Highest Employee Satisfaction by Industry: Insurance**
- **World Class Employee Satisfaction**

**Congratulations to Allan Bondi
finalist for CSR of the Year!**

**Congratulations to Kimi Miller
finalist for Supervisor of the Year!**

**Congratulations to these Top 10
CSR Improvement Winners:**

Dianne Campbell
Kelly Dodds
Walkyria Abelia



Call Center of the Year Finalist: **CANADIAN TIRE FINANCIAL SERVICES**



QUICK FACTS:

CALL CENTER SITE LOCATIONS: Three locations in Welland and St. Catharines, Ontario

NO. OF FTES: 550

SECTOR: Financial Services

SERVICES PROVIDED: Credit card contact center for Canadian Tire Financial Services (inbound customer service and sales calls for the Canadian Tire Options MasterCard)

OPERATING HOURS: Monday through Friday, 6 a.m.-12 a.m.; Saturday, 7 a.m.-11 p.m.; Sunday, 8 a.m.-11 p.m.

CUSTOMERS: 4.3 million cardholders

CHANNELS: Phone, email, web

TYPICAL CALL VOLUME: Average 300,000 calls/month, or 3.5 million calls/year

CALL CENTER INSIGHTS:

ON THE ROLE THAT FCR PLAYS IN PROVIDING A QUALITY CUSTOMER EXPERIENCE:

At Canadian Tire Financial Services our customer service philosophy is Customers for Life. Our ability to effectively resolve a customer's issue on the first contact (FCR) is critical in helping us deliver our mandate.

ON FCR IMPROVEMENTS ACHIEVED IN THE PAST 12-24 MONTHS:

Based on voice of the customer feedback and representative involvement in FCR improvement initiatives, we focused on three key areas:

1. Increasing the levels of authority and decision making for contact center representatives.
2. Screen layout and design enhancements to give representatives quicker access to key customer information.
3. Workflow design changes to simplify processes and remove unnecessary work that did not enhance the customer experience.

Including frontline representatives in our process improvements teams and initiatives has been a key success factor in making improvements to FCR.

ON COMMUNICATING FCR GOALS/PHILOSOPHY TO FRONTLINE STAFF:

First-contact resolution is communicated to our frontline representatives within the context of our Customers for Life culture. It is broadly communicated and reinforced at all levels through:

- Town Hall Meetings
- Monthly Team Meetings
- Rewards and Recognition Programs
- Internal Communications

ON ENABLING EMPLOYEE ENGAGEMENT THROUGH POLICIES, PRACTICES AND PROCEDURES:

The management team works extremely hard to engage our frontline staff in all aspects of the contact center. We maximize employee engagement by involving our contact center representatives in critical business issues and by giving them the opportunity to be part of the solution. The average tenure of our frontline representatives is 12 years, which gives us a wealth of knowledge and experience to leverage. Our representatives care deeply about the work they do and our daily focus is to continue to enable that mindset.

KEY STRENGTH OF THE CENTER:

The key strength of our contact center is the culture and the skills of our contact center representatives.



Brother Canada is thrilled to announce that our **Customer Support Center** has been awarded top honours by the Service Quality Measurement (SQM) Group, for the second year in a row.

Our 2012 Canadian call center service quality awards include World Class Call Center* and 14 of our agents were ranked as “World Class Agents*”.

“(They’re pretty thrilled too.)”

Great people delivering a superior customer experience.

A LOOK BACK: PREVIOUS AWARD WINNERS



INSPIRING WORDS FROM LAST YEAR'S CSR AND SUPERVISOR OF THE YEAR WINNERS

AS WORLD-CLASS call center teams gather in Las Vegas to honor the recipients of the SQM's 14th Annual Most Prestigious North American Call Center Service Quality Award of Excellence Winners for 2012, we asked last year's CSR of the Year and Supervisor of the Year Award Winners to share a few words about their experiences winning this highly regarded recognition, and to learn about the impact the awards have had on their careers, outlooks and personal goals.

Danny Sipchand,
Rogers Communications Enterprise Service Delivery
2011 CSR OF THE YEAR AWARD WINNER

Rogers Communications' Enterprise Service customers have come to depend upon Danny Sipchand's proactive service approach. His customers praise his tireless attention to detail, unfailing enthusiasm and willingness to go the extra distance to ensure that his customers' expectations—and unspoken needs—are taken care of.

While the service he provides is a constant source of surprise and delight for his customers, for Danny, the "endless opportunity to help clients," is what inspires him the most about his role as a CSR. His genuine desire to help motivates his drive to turn "negative experiences into positive learning experiences, and retain strong business relationships during the process."

In fact, turning customers into raving fans is one of Danny's unique skills. What's his secret? He offers this advice to other CSRs: "Listen carefully to what your customers are saying, and probe for more information, if necessary. Then provide solutions to the customer's

issue and follow through to ensure 100% customer satisfaction. Essentially, seek first to fully understand before trying to amend a situation."

While the work can be challenging at times, the positive feedback that he receives from his customers and the value it provides to his organization makes the hard work worthwhile. "Hearing that the service that you provide is second to none, or perhaps better than the service received from our competitors, is extremely satisfying," Danny says.

While being named SQM's 2011 CSR of the Year Award Winner was no surprise to his customers, Danny said that he was in shock when his name was announced. "It was surreal to win," he says. "I felt very proud of myself and my company. My family, friends and colleagues were very happy for me. The recognition made the hard work feel like it definitely paid off—and winning motivated me to continue working passionately."

Lisa Jones,
Sun Life Financial
2011 SUPERVISOR OF THE YEAR AWARD WINNER

To her team, Lisa Jones is the epitome of what a great coach aspires to be: passionate, committed, encouraging, patient and insightful. She is selfless in her drive to help her team members grow and improve, understanding that their success is her success. What does she enjoy the most about her job? "It is when my team or a team members reaches a goal," she says. "I thoroughly enjoy it when I see a person gain a true understanding of a concept that will help them to reach their goals and help them succeed. It may require coaching using several

different techniques and resources, and it can be short-term or long-term, but when I see it on their face that they truly 'get it,' I'm thrilled, and I know that I've done my job well."

Lisa recalls her work with one individual as a particularly memorable coaching experience. As she explains: "It was a success that took many months to achieve. As we all know, for business to succeed, there must be continuous growth and improvement, which ultimately leads to raising the bar.

"In this case, a senior rep felt that her performance over the previous 10 years was sufficient, and she struggled with why (as perceived by her) all of sudden her performance wasn't good enough. There was persistence on my part to show her that she was good enough and that, in fact, she had potential to not only reach the new expectations but surpass them. Through the power of positive re-enforcement to help her see her worth, showing her specifically where she could have impact (tone of voice, speech patterns, building rapport, knowledge), she began to have faith in herself. Then one day she came to me and said, 'Next year I will be World Class Certified, and this is how I am going to do it.'

"What made this memorable for me is that, she not only set the goal, she understood exactly what was needed on her part to make it happen. She did make this happen! I always encourage my people to understand that this is their career, ultimately, they are accountable for the end result, not me. My accountability is to ensure that I help, lead and guide them to assist them in achieving their successes."

In addition to helping reps meet individual development goals, Lisa strives to link reps'

performance to the company vision, and help her team to understand the impact that they have on business growth and improvement. "To me, it's very important that myself and my team understand the 'why' behind objectives," she says.

Winning the 2011 Supervisor of Year Award has brought to light not only Lisa's accomplishments, but those of her team, which has been World Class Certified for 2012. Sun Life Financial also has recognized Lisa's expertise. She has been asked to share her coaching skills with others within the organization, as well as with a broader audience, which has helped her to hone her presentation skills. This year, Lisa also was promoted to a manager role, and says that she is thoroughly enjoying the new challenges. "I am now in a position where I not only coach and lead my team, but I am coaching the coach," she says. "This is a new experience for me and I am thrilled to be able to share my knowledge to help my leaders and team grow."

We asked Lisa to share her advice on how to coach representatives to provide world-class performance. "Treat each team member as an individual," she says. "Each person should completely understand the team goal, but should also have individual goals. Be open and honest when providing positive and constructive feedback as you help them realize their personal goals. As the individual becomes stronger and more satisfied so does the team. While doing this have some fun! We all spend a large part of our lives at work being productive... we might as well enjoy ourselves in the process."

AWARD-WINNING STORIES FROM THE FRONT LINES FOR CSR OF THE YEAR

DISTRAUGHT HUSBAND WHOSE WIFE HAD ONLY DAYS TO LIVE

"He took ownership of this situation and refused to quit until he was able to help."

Aaron got a call late on a Friday afternoon, from a very distraught husband whose wife was in the hospital with only days to live. Her primary insurer had been cancelled for some reason and she was not able to get her pain medication from the pharmacy. Aaron went to his manager for assistance with this call. He took ownership of this situation and refused to quit until he was able to help.

In the employee's file, he was able to see that the benefits were active at the primary insurer end, and that the disconnect was with the secondary insurer. Aaron took it upon himself to call the secondary insurer directly, and working in partnership with them, he was able to get the benefits reinstated immediately. Aaron asked the secondary insurer to call the pharmacy immediately to get the prescription filled for the ill wife. The prescription was filled and the patient was able to finally have some relief from her pain. Her husband was extremely grateful that Aaron took charge of this, and that it only took one call to have this resolved. Aaron was so very relieved to have been able to help to ease the gentleman's anxiety and the wife's pain. As Aaron commented, "That call made my day today."

After Aaron made sure that the most pressing issue was covered, he then followed up to ensure that the wife's coverage was updated with the pharmacy to prevent further stress to the family at that critical time.

—Aaron McCulloch,
TELUS Sourcing Solutions Inc.

STAYING ON THE LINE WITH THE MEMBER UNTIL THE EMTs ARRIVED

"Allan kept the caller calm by talking to her. He reassured her that he was there with her and would not end the call until he knew she was safe in the care of the EMTs."

Allan Bondi received a call from a member in Detroit. The member explained to Allan that she had an emergency. She needed medical transportation. She had called her health care doctor but had been told to call back when the doctor's office was open. Allan could have easily explained that she called the wrong number and that we are her vision insurance carrier.

However, Allan quickly recognized that this was not a normal benefit call and his caller needed assistance. As he was looking through the member's vision benefit screen, he noticed that this group had a comment regarding transportation for members and provided a number to call. Allan placed the member on hold and called the number. He was placed on hold. After a minute, he checked in with the member. In a shaky voice, the member told Allan that she was having trouble breathing and her chest hurt. Allan immediately hung up with the transportation line and called 911. Allan is located in Sacramento, so he explained the situation to the Sacramento dispatcher who then provided him with the number for the Detroit Police Department. After another transfer with the Detroit Police Department, Allan was connected with the Detroit 911 dispatcher.

When I listened to the call, I was amazed at how calm, clear and concise Allan was as he jumped these hoops and explained the situation. The Detroit dispatcher told Allan to tell the member that assistance was on the way and to loosen her clothing and provide any medication

to the EMTs that arrived. Allan agreed with the dispatcher and let them know that he was once an EMT. I believe this made the dispatcher feel good about letting Allan stay on the line with the member. Allan swapped the line back to the member. While on the line, it was very clear that she was under duress and scared. She even let Allan know that she was scared to have an ambulance come. Allan kept her calm by talking to her. They talked about family. The member shared with him that she was proud of her children and that her son was a wonderful high school student and her daughter was about to graduate from college. After 30 minutes, the EMTs finally

arrived. She was afraid to open the door, but Allan reassured her that he was there with her and would not end the call until he knew she was safe in the care of the EMTs. The member was then in the hands of the EMTs. CSRs are heroes to our many callers every day. This time Allan was a Super Hero.

—Allan Bondi,
VSP Vision Care

URGENT NEED FOR MONEY TO AVOID EVICTION

"She started crying again and thanked me repeatedly for getting this completed for her."

Working in a call center, you never know the customer's situation or what you will need to do to resolve an issue. On this particular day,

a customer called our call center and reached me. This customer was extremely upset that her pension had not been unlocked, and a withdrawal that she had requested had not been processed. She was dissatisfied with the service of Sun Life Financial and felt that we were not living up to our brand promise. She requested the total amount in her Locked-In Retirement Account (LIRA) to be unlocked and transferred into a Registered Retirement Savings Plan (RRSP) along with a cash withdrawal. A previous call center representative (CCR) had quoted to her a turnaround time of 1-3 business days. When I got the call, we were on day 5 of when she had originally faxed her request.

She was desperate to get this money, as she could not make ends meet and might be evicted from her apartment. She was in tears. I listened to her frustration, felt her pain and told her that I would investigate and get back to her the following business day. I immediately went into action by emailing the administration team on an urgent priority in hopes of getting an answer the same day. That, unfortunately, did not happen. The following day, when I still did not hear from the administration team, I pulled a colleague over to help me review the legislation rules regarding the customer's pension. We looked over the transfer request to make sure that it would not be rejected.

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After we both decided that the request should be good to go, I called the admin team directly and walked them through our customer's situation. This is not something that we normally do in the call center, but I felt that this issue needed to be dealt with as soon as possible. The administration team stepped up, agreeing to backdate the inter-product transfer to pull it from a LIRA and into an RRSP. The administration team then current-dated the withdrawal, even though we were already past the cut-off time to process it. They were impressed that I went out of my way to call them, as they do not usually hear from us. I felt it was nice to put a voice to the name that I always see in emails.

I then looked over the service request and saw that that the

member had called in again earlier that day and had the call escalated. She felt we were holding her money for no reason. She was even tempted to call the Ombudsman's Office to complain about our services. When I called her, I reassured her that Sun Life Financial would never hold her money intentionally if that was not her request. I told her we had processed the withdrawal that day and that it would process that evening. The maximum would be 3 business days before she saw it in her account. The plan member was thrilled. She started crying again and thanked me repeatedly for getting this completed for her. She stated that I had restored her faith in Sun Life Financial. She would keep her business with us, because she knew

that we cared and took her request seriously. It all came together in the end. While I was on the front line helping the plan member, this was a team effort. The plan member's urgent needs were met and we ultimately delivered on our brand promise.

—Angela Proulx,
Sun Life Financial

DELIVERING EXCEPTIONAL SERVICE TO A THREATENING CUSTOMER

"She had to demonstrate all the essential customer service skills to satisfy this understandably irate customer's needs."

Cherisse Wallace truly demonstrates a passion for serving all her customers. She continuously receives customer commendations (both verbal and written) for her dedication to satisfying customer needs.

One story in particular is most significant this year as the customer was threatening to end all relationships with Scotiabank Trinidad and Tobago, based on the poor customer service she felt she had received to date from the organization. Cherisse was not at all disheartened by the customer's threats and simply focused on delivering the very best solution to resolve her concern within the shortest possible time frame.

The customer had previously provided Scotiabank with instructions to issue a check payment to a competitor credit card. The customer however, received a call from the competitor bank advising that late fees and additional interest charges would accrue on the credit card account due



to non-payment of account. Of course, once Cherisse answered the phone, she had to demonstrate all the essential customer service skills to satisfy this understandably irate customer's needs.

Cherisse did not just deliver exceptional service; she far exceeded the customer's expectations. She first contacted the mid-office at Scotiabank and checked on the status of the check. She kept the customer informed of any significant development in the process. Consequently, she was able to obtain full resolution of the issue on the same day she received the call. Cherisse created a positive, memorable customer experience and she successfully changed the customer's perception of the service provided by the

organization. The customer took the time to write to the center following her interaction with Cherisse to ensure that management were made aware of the service provided by this outstanding employee. Cherisse was promoted in May 2012 due to her consistent delivery of superior customer service as confirmed by her World Class Certification for the second consecutive year!

—Cherisse Wallace,
Scotiabank International
Trinidad and Tobago

EMPATHY FOR A FAMILY BRINGS THEM FINANCIAL RELIEF

"Her interaction with me completely changed her thoughts on the integrity of insurance companies."

Last year, I was a CCR struggling with my Voice of

the Customer (VoC) results. This year, I far exceeded the score required to be World Class Certified. It was in that evolution that I grew to understand both the impact I can have on my callers, and the fierce sense of pride that comes from doing right by them.

One day, I received what seemed, at first, to be a clear-cut request from a member for the balance of a particular spending account. That's how simply it had started but certainly wasn't how it ended. She mentioned that she had incurred some very costly expenses and was hoping to have most of it covered by her spending account. When I asked who the expenses were for, she matter-of-factly explained that they were for her son but, because of his age, he was no

longer a dependent on her plan. With that, I hoped I would find a healthy balance in her account. Unfortunately, it was quite low. Before I relayed this information, however, I probed for the nature of the expenses that had been incurred. Based on the expenses she named, I started to wonder if perhaps her son might actually qualify as an over-age dependent on her plan, if he met the criteria required to be considered disabled. If that happened, at least a portion of these expenses could be reimbursed.

I was eager at the possibility, but also a little nervous about prying into such a sensitive matter. I knew that this possibility could potentially relieve a huge financial burden for the family. That potential was definitely worth my relatively

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inconsequential moment of discomfort. So, with care, I asked. She easily offered the fact that, yes, her son had special needs for his ongoing care, at which point I explained why I was compelled to ask. Her reaction was one of cautious excitement and gratitude to me for taking such an interest on their behalf. I assured her that I was only too happy to help. On the inside, I just felt such empathy for this family and a growing pride in the role I was playing as this issue unfolded.

I explained the next steps and, upon realizing that we didn't have her employer's phone number on file, I asked my customer to give me a moment as I searched Google, where I was able to find the

phone number we needed. I then conferenced the employer into the call and explained my reason for calling. Rather than waiting for the mail, I also suggested that the required forms be faxed directly to us so that we could expedite reprocessing of the claim. Even at that point, I don't think I really appreciated the impact of the actions I had taken in this call. Then, I heard it from my caller. She told me what this meant to her family and that her interaction with me and my company completely changed her thoughts on the integrity of insurance companies. She couldn't believe that we would actually look for a way to pay toward her son's expenses. I guess I had never looked at

it that way before, but I came to understand the powerful message that was sent through my actions. That call stuck with me and will always serve as a reminder of the difference I can make in the lives of my callers.

—Craig Shantz,
Sun Life Financial

MEMBER DID NOT HAVE TO RESCHEDULE SURGERY

"Liza began to work across several departments to identify the delay and rectify the situation."

Liza received a call from a member who was part of a newly contracted employer group. The member had been preparing for months to have a total hip replacement, which was to take place in a few days, and he was concerned

that he had not yet received any materials for his new benefit plan. In addition, the surgery was going to require precertification by our medical services staff.

The precertification process could not be initiated until the member's benefit plan was active. During the member's initial phone call, Liza was not able to locate an active benefit plan for the member or the employer group as there was a delay in the enrollment process. Liza was, however, able to discover through her research that all the necessary information had been received from the employer group, including the member's application, but everything was still in the process of being set



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up in our systems. The member became increasingly concerned that he may have to postpone his surgery and was quite frustrated with the delay in the enrollment process.

Liza took immediate action and ownership of the member's concerns. Liza was able to reassure the member that she cared about the situation and would work on this right away. She comforted the member and told him that she would be back in touch with him as soon as possible. As a customer service professional, Liza's responsibilities did not include sales, the application process and enrollment, benefit set up, system configuration or medical precertification. However, Liza took it upon herself to become the member's voice and began to work across several departments to identify the delay and rectify the situation. Leaving the member hanging was not an option for Liza, and she was going to do her best to make sure the employer group's enrollment was completed and the member loaded into our systems.

One of the joys of being a small company meant that Liza could work closely with other departments. She contacted the group sales representative, the account manager and the group enrollment department to request this paperwork be pushed through as a high

priority. She then walked over to the configuration department that was handling the benefit set up for this new group. She explained the urgency of the situation and the configuration representative agreed to expedite the benefit set up process. The system configuration and set up were completed the next morning and Liza then worked with the membership department to load the member's application as a priority—all the while keeping contact with the member so that he was aware of every step being taken. The next day, Liza was able to initiate the precertification process with our medical services staff and make sure that any necessary approvals were in place, including the member's prescription medications.

What normally takes weeks, Liza accomplished in two days due to her commitment to provide World Class Service to our members. The member was extremely pleased and expressed to Liza that, if he would have had to reschedule the surgery, it would have taken an emotional and physical toll on him and his family. Through proactively working across several departments, Liza was able to expedite the enrollment and precertification process so that there was no negative impact on the member. This type of above-

and-beyond service really sets Liza apart as a World Class Call Center representative. It also reflects how the culture of World Class Service is spreading its way through our company, from customer service representatives to other departments for a total World Class member experience.

—Liza Mountford,
BlueCross BlueShield of
Vermont

CUSTOMER PREPARING FOR RETIREMENT PROVIDES SUGGESTIONS FOR FCR

“Due to this, the TELUS Sourcing Solutions’ client will be making some changes to improve call resolution for all their customers who phone in for this same reason.”

Jordon received a call from a customer who was preparing for retirement. This customer had called in three times previously, but still needed guidance with the retirement forms. Jordon was very patient and calm throughout the call; she took the time to give step-by-step instructions to the caller and ensured that the instructions were clearly understood by the caller. Jordon followed up via email with the customer. She also engaged the client Benefits team to make sure the forms were correct and confirmed that they had been received. The caller was very appreciative of Jordon for taking the time to help address all of the caller's concerns. The caller had some suggestions on how to make the process easier for retirees and Jordon, in turn, sent those suggestions to her manager who passed them on, as well. Due to this, the TELUS Sourcing Solutions’ client will be making some changes to improve call resolution for all their customers who phone

in for this same reason. The customer was very happy to have finally received the answers that she needed, and that she will no longer have to call us back to follow up.

—Jordon Lowe, TELUS
Sourcing Solutions Inc.

WORKING THROUGH THE NIGHT TO COMPLETE AN URGENT REQUEST

“Much team work, communication and outside-the-box thinking was required to successfully complete this urgent request.”

On July 22, 2012, at 9 p.m., Richard Cloutier received a call from the Director of Business Care for Rogers regarding an ongoing issue that required support for one of our corporate clients. Their incoming call center had lost all service and was unable to receive calls from their customers.

Working closely with other departments, Richard determined the new types of plans the client required and quickly created a new account. He then manually activated all 65 wireless phone numbers, SIM cards and devices enabling the client to resume business using our wireless network. This work ended nearly five hours later; Richard had worked through the night until 4 a.m. Here is the client's feedback on Richard's efforts:

“As a member of the [client] team, I want to thank you very, very much for turning 65 cell phones and activations around in under five hours! This is greatly appreciated by us and we are thrilled with the can-do attitude of everyone at Rogers. Your ability to step up and get us everything we asked for during this time of urgency is truly above and beyond! Warmest thanks.”

Richard, ever so humble, has said that much team work,

“THE CULTURE OF WORLD CLASS SERVICE IS SPREADING ITS WAY THROUGH OUR COMPANY, FROM CUSTOMER SERVICE REPRESENTATIVES TO OTHER DEPARTMENTS FOR A TOTAL WORLD CLASS MEMBER EXPERIENCE.”

communication and outside-the-box thinking was required to successfully complete this urgent request. Richard's hard work and commitment to his clients is second to none, which is why he is often regularly called into these critical client situations where his expertise, experience and customer focus are most needed. On behalf of all the clients that you have supported, especially when we are faced with emergencies and need your help, thank you, Richard!

—Richard Cloutier, Rogers Enterprise Service Delivery

RESTORING THE BUSINESS/ CLIENT RELATIONSHIP

"You truly exemplified the kind of service that one should expect when paying for services."

This nomination for Rokhaya came directly from one her customers:

"Rokhaya, I would like to commend you for your outstanding customer service, professionalism and diligence when troubleshooting the issues I experienced with my mobile account. During the period between May-July 2012, I experienced an ongoing issue with my voicemail service and had limited success resolving the issue with other representatives. Thankfully, my file was transferred to you.

"Even though it took a few weeks to resolve the problem, I greatly appreciated your continuous status updates and receiving access to your direct line. You were attentive and truly exemplified the kind of service that one should receive.

As a business owner and Rogers' patron, I understand the importance of quality customer service whether it is being provided or received; it is something that makes for a rich and valuable experience between businesses and clients.

"I am certain that, in your role, you hear complaints so it is equally important to hear positive customer feedback. Once again, I would like to sincerely thank you for your excellent customer service."

—Rokhaya Gueye, Rogers Enterprise Service Assurance

FAMILY OF 6 STRANDED AFTER HITTING A DEER

"She was proactive in finding out what would be easiest for the customer, but also would not cost the corporation a lot of money."

Last year, Tracy did not achieve World Class Certification, but because of her dedication to be more customer service oriented and more focused on resolving customer issues, she has achieved World Class this year. One particularly dramatic customer service story is indicative of her enthusiasm for doing as much for a customer as she possibly can.

Working on a Sunday afternoon, Tracy got a call from a customer who had been on his way home from vacation with his wife and four children in their minivan. The night before, they had hit a deer on a highway and caused so much damage that their vehicle was no longer drivable. With no available credit and only \$50 in his pocket, the customer couldn't afford to get a motel

for the night and his family—all six of them—had to sleep in the van in the tow yard. They called to make their insurance claim the next morning and got Tracy.

She found out that the family lived about 280 km from where they had their accident and the town that they were in had only one car rental agency. She knew right away that it wasn't going to be a straightforward call and would take a little leg work. Tracy started to research how, without any money in their pockets, she could get all six family members home. She was proactive in finding out what would be easiest for the customer, but also not cost the corporation a lot of money.

She tried the towing company first. If they could tow the vehicle and bring the whole family, that would be the best option. But the tow truck could only take four passengers in the cab of the tow truck. Next, she tried the rental agency: They had only one vehicle left in their lot and it could hold only five people. She thought that, if they took the rental car, the last person could take the bus home; therefore, she looked up the bus fare on the Internet (thinking that the customer still had some money in his pocket; he could use that and get reimbursed). However, the bus fare was just over \$50, and there was no way to directly bill. And even if that had been an option, the vehicle towing was still an issue. The customer was insistent that his vehicle was not a write-off.

Tracy knew that she would have to get manager approval for any plan she put forward to the customer, but instead of simply transferring this call to a manager to deal with, she took on the challenge. She decided to call the towing company and rental agency to

get some dollar figures so they could make the best decision. During their conversation, the tow driver explained that while he could take some family members in the tow truck, his wife would be willing drive the rest of the family in her car. Tracy negotiated how much they would be paid for this service and then called the rental company to find out how much they would charge for the rental and the out-of-town drop-off fee. While she did all of her research, she called the customer back to make sure he knew that she was still working on it and that she had not forgotten about him.

By the time she presented the options to the manager for approval, Tracy had done all of the research and care so that it was easy for the manager to make a sound decision for the corporation, but more importantly, for the customer and his family. Tracy took extraordinary steps to ensure that this was a positive customer experience for this family. This call started out as a dramatic no-win situation for this family, but luckily for them, Tracy took the extra time and attention to help this family get back on track and feeling like their insurance company had their best interests in mind. Way to go, Tracy!

—Tracy Hall, Insurance Corporation of BC (Claims)

EMERGENCY CREDIT LIMIT INCREASE CALMS A FRANTIC MOTHER

"I pleaded the customer's worthy cause of an emergency limit increase."

Ever since I was young, I was taught that you either do things right, or you do not do them at all, because the things that we do define ourselves and our success. I am always

**"THE THINGS THAT WE DO
DEFINE OURSELVES AND
OUR SUCCESS."**

willing to help those around me because they are integral to my own development. This is why I am committed to finding solutions to the problems that I am faced with, and I make the effort to make each interaction a memorable one.

One day, I had the opportunity to help a customer with a problem that she did not know how to solve. She said, "I hope you can help me because I do not know what to do. My son, who is living in Spain, is relying on you to help him so he can eat dinner and is not kicked out of the place he is staying." I told her that I was eager to help and proceeded to verify her information. As I was verifying her information, she told me that the card her

son was trying to use to buy a book was not working and that this card was the only means he had to buy his necessities. After carefully listening to her needs and looking into what was happening, I was able to see that there were no funds available on the card. Upon hearing this, she became even more anxious and asked desperately, "Now what am I and my son supposed to do? I can put money on his card; however, it will not be available for him today, and it will be the middle of the night when the money is available to him where he is." I asked her if she could hold and notified her that I would do my best to resolve her issue so that her son would be alright and able to sleep in

his bed.

I pleaded the customer's worthy cause for an emergency limit increase. It was authorized and I returned to the phone with the news that the card could now be used. The customer was overjoyed because Scotiabank and its CSRs cared about her situation and placed so much trust in her. She concluded that:

"Nobody, in my 56 years, has looked after me and helped me the way you have, Alesandro. Goodbye and bless you. I am very proud to be a part of Scotiabank, I am proud to be a customer and proud to know that people like you are the ones looking after my interests. Words are not enough to describe you, but I do know that you are genuine and

someone who tries to excel at what they do. You deserve the best. Now I know I will always have somebody to go to if I have problem. Your service is incomparable."

In cases like this, I feel like a doctor and that the solutions to the financial problems of my patients (clients) are in my hands. They can only achieve the definitive solutions to their financial needs by offering efficient, truthful and timely service. I know I have achieved what the customers expect by listening to how satisfied they are after I have looked after them.

—**Alesandro Valenzuela**,
Scotiabank International
(Dominican Republic)

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AWARD-WINNING STORIES FROM THE FRONT LINES FOR SUPERVISOR OF THE YEAR

BRAINSTORM IDEAS FOR AN ACTION PLAN TO IMPROVE WORLD CLASS SCORES

"Adding more inflection to her voice and adding a 'smile' to her tone made a world of difference."

As a supervisor, Chantal exudes confidence, encourages her staff, is empathetic, an excellent problem solver and a daily role model for her staff. The performance of her team is a reflection of Chantal's dedication. Chantal is a positive presence in the call center and is always approachable and receptive. During her day, Chantal can be found answering both staff and customer questions, taking calls during times of high volume, working to resolve departmental and customer inquiries, all on top of her usual supervisor duties.

In early 2011, Chantal and her team leads began to notice a slow but steady drop in one of the team member's SQM scores. There was no immediate concern as scores can fluctuate month to month. This representative, Liza, maintains excellent internally measured quality and is a dedicated member of the team. Despite the best efforts, Liza's World Class score was not showing sustained improvement. As a team, we met to discuss her performance, brainstorm ideas of why there was a slow but steady decline, and try to come up with an action plan. Chantal approached the situation with a strong desire to help Liza improve her performance and increase her SQM World Class scores. Chantal was open to feedback and was willing to work closely with Liza and her team leads to identify the heart of the issue and make the necessary adjustments to her workflow.

Chantal encouraged and supported that Liza and her team leads begin to meet on a weekly basis to evaluate what was happening with her scores, to identify areas of possible improvement, determine where immediate changes could be made, and build a long-term plan. During the weekly meetings, we listened to her previous calls

to identify areas of improvement. We focused on quality over quantity, taking a member-centered approach, having Liza own each issue a member presented and strive to resolve that issue in one interaction. Controlling her call flow and taking her time during the call ensured that callers felt heard, cared for, and helped. Chantal identified that, in addition to Liza's overall call flow and member-centered approach, there was an area of potential improvement with Liza's vocal tone during her calls. Adding more inflection to her voice and adding a "smile" to her tone made a world of difference. Chantal also worked with Liza on techniques that would improve her rapport with her callers. Chantal made this a team effort utilizing her team leads for extra resources. These efforts combined with a strong desire on Liza's part to be successful and to service her customers to the highest level, resulted in a highly engaged team focused on making the improvements necessary to increase Liza's World Class scores.

With Chantal's encouragement, excellent problem solving and by being a top-notch role model, Liza felt comfortable and was open to feedback. She was not afraid to reflect on her own performance and accept the areas that she needed to change. Chantal's hard work paid off; Liza is now in the first quartile for World Class and is a Certified World Class Representative based on SQM's criteria. This recognition is a reflection of Chantal's dedication to supporting her staff and commitment to "Always Putting the Member Experience First."

—Chantal Parent,
BlueCross BlueShield of Vermont

LEADS BY EXAMPLE: "WALKS THE WALK AND TALKS THE TALK"

"Sits on the floor with her team and handles all call types right alongside the agents."

Diana deserves the Supervisor of the Year Award because she “walks the walk” and “talks the talk” of First Call Resolution (FCR). Diana sits on the floor with her team and handles all call types right alongside the agents. She holds her team to a high standard and helps them understand how to resolve their calls. In October, Diana took an escalated call from a very irate member. She went above and beyond and fixed the problem.

Beyond that, however, this member asked to speak with Diana’s boss to give feedback. The member stated that Diana was: “One in a million and showed true character. She was honest, reliable and trustworthy and did an excellent job. She always called back as she promised and represented the company beautifully. She gave exceptional service!” For one of our members to speak this highly of Diana only confirms what we already know—she truly is one in a million and motivates us every day to go the extra mile.

Diana is consistently reviewing SQM surveys and quality scorecards for her team. She gives feedback constantly of opportunities for improvement and jobs well done. I’ve seen her multiple times at an agent’s desk with training materials out, stepping the agent through the workflows and teaching them how to really take ownership of their calls. She is a joy to be around and the call center always feels happier when she walks in. Diana is an exceptional supervisor.

—Diana Bechtel, Allegra Direct Communications

ENHANCED COACHING STRATEGY PROVIDES OUTSTANDING MEMBER EXPERIENCES

“The member wants to be

heard and understood. It is very important to build a good rapport with your caller.”

“We are committed to the health of Vermonters, outstanding member experiences and responsible cost management for all of the people whose lives we touch.”

When I first started at BlueCross BlueShield of Vermont a couple of years ago, I never thought this would be our mission statement. Today, we could not be more proud of servicing our members while resolving their calls and providing the best member experience we can. Our customer service team has come a long way. We strive to provide the best member experience possible and have spent countless hours running reports, comparing and contrasting world class calls with calls that were not resolved, providing feedback, completing individual coaching sessions and team staff meetings, and implementing several enhancements to processes within our company to achieve resolution and member satisfaction. We realized that coaching was the most important part of this process.

Being fairly new to the role of Team Lead, I had a lot of learning to do myself. It was through trial and error that I found out which coaching strategies work best for different representatives. I took coaching and mentoring classes to improve my skills, which, in turn, helped my representatives increase FCR and member satisfaction. It can be very difficult to change a habit or a way of doing something. Starting with the more seasoned representatives, I worked with them daily to

change their mindset from what they were used to (numbers, such as how many calls you can take in a day), to focusing on the member experience. I consistently sent the message that it no longer matters how long you spend on the phone with that one member as long as they walk away with a very positive member experience and their call is resolved.

But how do we get our representatives to understand this and act upon it? I provide coaching, mentoring and feedback on a daily basis. We also enhanced our coaching strategy. We meet monthly with our representatives on a one-on-one basis. This is a structured meeting focusing on member satisfaction and how we can ensure resolution. We focus strictly on that one representative’s personal statistics. Before we meet, I listen to and transcribe all calls that were surveyed, noting what the representative did well and if there were any opportunities for improvement. In our meeting, we review all surveys in depth. If there was a coaching opportunity, we reviewed what the representative could have done to enhance the member experience and ensure resolution. We review different techniques, phrasing and options that they can try to achieve a more favorable result in the future, such as their peers’ best practices. I then document the opportunities that were identified so we can see if they continue to struggle or show improvement. I also document what the representative did well and encourage them to continue, as it is having a positive impact.

The member wants to be heard and understood. It is very important to build a good

rapport with your caller. I coach my team to take ownership of the call, don’t lay blame, and to apologize, empathize and congratulate the member when appropriate. Also, to give responses such as “I can” and “I will” so the member is confident that we will resolve their issue. We are here to help, and ensure understanding by asking clarifying questions and reiterating what the member said. I have found that consistent feedback and mentoring are key to achieving member satisfaction and call resolution. By enhancing my monthly coaching meeting, focusing on call flow and the member’s feedback, we are able to ensure member satisfaction and first-call resolution.

—Jessica Pinkans, BlueCross BlueShield of Vermont

BUILDING A WORLD CLASS TEAM

“I attribute these honors to her guidance and leadership.”

I began working with Carla Principato in the fall of 2010. When I joined the Customer Service Centre, I had only been working in a CSR role for just nine months. Of the two years I have reported to Carla, I earned World Class Certification both years. I attribute these honors to her guidance and leadership. In 2011, I was awarded Top 10 Most Improved CSR by SQM and continued to remain at the top of our World Class Ranking list within our company. The coaching Carla has provided me has given me the confidence, knowledge and tools to become a World Class employee. Carla is a very intelligent, patient and approachable manager. She is well liked not only by those who report to her, but companywide. The biggest compliment I can give to Carla is that she had five World Class

employees on her team in 2011 and nine World Class Certified employees in 2012. This speaks volumes of Carla's ability, passion, professionalism and capability as a supervisor. She is the best, and I know I speak for everyone on her team when I say that she truly deserves this honor.

—Carla Principato, 407 ETR

**CHARISMATIC LEADERSHIP
EMPOWERS TEAM TO ACHIEVE
WORLD CLASS CERTIFICATION**

"She always encouraged us to leverage each other's strengths and to share best practices so that together, as one team, we are all winners."

I am proud to be a part of the team that achieved organization World Class

Certification. I would like to attribute our success to our manager Samantha's charismatic leadership. It's an honor to vouch for her to be the Supervisor of the Year.

It's her dedication and commitment to lead us for certification that reaped us this reward. It's an outstanding achievement given that Samantha and our whole team were in Business Service Delivery for Small Business and became a Commercial team at the end of January 2012. She is a role model for service orientation and "can do" demeanor for internal and external customers. Members from her previous teams and Business support teams would always approach Samantha

because she is known to care and do her best to help resolve customer issues.

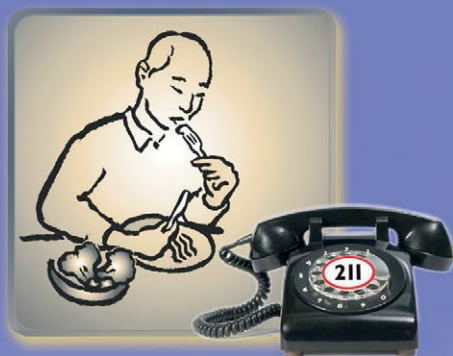
She is passionate about every aspect of customer service and is a very empathetic person. She set goals for us and gave us regular updates on our achievement of World Class Calls and she always stressed the importance of FCR. She regularly listened to our calls and provided positive and constructive feedback on coaching opportunities. In our weekly team meetings, she always shared our results as a team, saw opportunities for improvement and recognized and rewarded the achievements of our peers. This motivated everyone to do their best. She would always empower us

and give us the necessary time and support. She was always there and always acted on our feedback to review processes to ensure that they were working well, and she challenged and made recommendations to change those that did not, in order to improve her team's FCR and Csat scores. She always encouraged us to leverage each other's strengths and to share best practices so that together, as one team, we are all winners.

—Samantha Mahabir, Rogers Commercial Service Delivery

**TURNING A NEGATIVE
SITUATION INTO A POSITIVE
CUSTOMER EXPERIENCE**

"She helped me to understand this significance from resolving the call to the customer's satisfaction."



Thank you for answering the call

Highest Customer Service in the Government Industry
& Call Centre World Class Call Certification

Congratulations to everyone on the phone and behind the scenes, on a job well done!

**When you don't know
where to turn.TM**

Ontario 211 Services Corporation



**Quand tu ne sais pas
vers qui te tourner.^{MC}**

SUPERVISOR OF THE YEAR FINALISTS

My name is Kimberly Kennedy and I've been on Kimi Miller's team since May 2012. I have been in the workforce since I was 16 years old, from fast food to call centers and different administrative/customer service positions including California State service. My experience at VSP has been a very positive and unique experience which, in my over 20 years of work experience, I have never encountered at any other company.

Kimi has made it a pleasure to work at VSP. She has a unique and positive approach to each team member and to her team as a whole. Kimi is very approachable and open to providing additional training and coaching, as needed. I joined her team after

I finished training, and asked for additional assistance and a better understanding of my job functions and how our whole customer service department works. She set up side-by-sides for me right away with many of our support teams and other more tenured team members so that I would be more successful in my job performance. As a result of this training and continual coaching and encouragement, I've been able to improve my overall SQM scores.

There were a couple of situations when I needed coaching. It was truly a learning experience. Kimi is very diligent in reviewing my SQM scores with me and explaining how the voice of the customer response

affects my results as a whole. She helped me understand this significance from resolving the call to the customer's satisfaction to positioning negative situations in a way that the customer is more satisfied with their experience. I did not start having SQM audits until June 2012 when I completed my training, so I am confident with her advice and coaching and continual encouragement and feedback, I will certainly reach the goal of World Class CSR in the next qualification period.

I am now a team coach for new employees during different stages of their training. That is one step toward reaching my goals here at VSP. It is truly an honor and pleasure to give

back and provide the same feedback as I was given during my training here at VSP: to help others succeed in their goals at VSP. Kimi is an encouraging team leader. She is very talented and skilled at drawing out the talents and strengths of each individual on our team. She makes every one of us feel appreciated and valued for our efforts and hard work on a daily basis. Kimi is fair, kind-hearted and also handles private information with the utmost dignity and respect and professional manner. She is supportive and fair to the whole team. She is a clear example of our VSP core values.

—Kimi Miller, VSP
Vision Care

emedco

Solutions for a Safe, Secure Business



We're honored to be selected for the award of the Highest Customer Satisfaction in our Industry. Congratulations to our World Class CSRs and Managers!

AWARD-WINNING STORIES FROM THE FRONT LINES FOR CSR FCR/CSAT IMPROVEMENT

MAKE EACH CUSTOMER FEEL IMPORTANT

"There is nothing worse than feeling like you are just another number, so I try to be as human and sincere as possible when people call in!"

I started in the Group Benefits Contact Centre in May 2010. As for my early Voice of the Customer (VoC) results, I was kind of scared of the program and didn't want to check my results, but after a few months, I started to find it very helpful and started checking every morning. It is really nice to get feedback from the callers, and if they make a comment, you can definitely take it as a constructive criticism. Even if you get a bad review, it motivates you to be more careful and try to get better results on every call. I can attribute my VoC improvement over the past year to a few things.

I have made a conscious effort to take the time to listen to callers to solve their problems to the best of my ability. I try to be as sincere as possible and make sure that I can help them in one call, whether that call lasts 30 seconds or 10 minutes. I know that, when I call a call center, I don't want to speak to someone who acts like I am just another number or feel as though I am being rushed off the line and my call isn't important. There is nothing worse than feeling like you are just another number, so I try to be as human and sincere as possible when people call in!

Another reason is the support that I receive from my leaders. At first, when I started working from home, I thought that I would not have the support that I had when I was working in the office, but I was mistaken. It is so nice to be working and get a little instant message or phone call from my supervisor, even if it is just to say hello and ask how my day is going! That effort really makes a big difference when you're working alone all day, and it is so nice to know that, even though you're not physically in an office working with

others, there is someone there who is making sure everything is alright and is going smoothly for you. Also, knowing that you can send a quick message and get support very quickly is reassuring. I really appreciate how supportive all of my leaders have been while I made the transition from working in the office to working from home.

Whenever I made a mistake, I would write it down and post a note on my computer so it was always in my sight and I would be sure not to make that mistake again. I also decided not to take every call so personally. When I started this job, if I got a bad call, I would be very upset and it would bother me for the rest of the day and affect my other calls. Now I just try my best to be friendly and helpful—I feel much more confident in my abilities after being here for a few years. Also, the feedback and coaching available to me is very helpful. It is so constructive to see when a mistake is made so it doesn't happen again. It really is a confidence boost to check your chart in the morning and see only positive results.

FINDING AN ANSWER WITH THE PERSONAL CONNECTION

"The skill of active listening to fully understand what my customers needed also helped me improve my VoC results greatly this year."

The 2012 SQM year is a source of great pride for me. In 2011, I struggled to make comfortable connections with my callers. My Voice of the Customer (VoC) results suffered and were well below expected levels. Fast forward only one year, and my results are now among the very top of the entire call center team. I see my results daily and I must say that my pride hasn't worn off. Writing this story gave me the opportunity to do something I hadn't done yet, which was to actually think about all the changes I made that allowed me to make such an amazing improvement.

It didn't just happen. I am quite self-driven and I just wasn't satisfied with my VoC performance. I had to really get honest with myself about what was holding me back and I had to make the decision to get down and dirty and make the changes I needed to make. I just wasn't going to let myself or my team down. My supervisor worked with me to help me better understand my role—not only from a technical perspective, but from a soft skills, human perspective, as well. I learned that what I was delivering was only part of the picture. What the member would remember was how I delivered my message and the human connection I was able to make with them. This included such skills as positivity, compassion and empathy. I previously had been so zeroed-in on finding an answer that I didn't give much attention to the all-important human aspect.

I wouldn't have been able to make these shifts without perseverance and patience. Patience, not only in myself to realize that sometimes I would slip in my efforts, but also patience and understanding for my customers. I would often forget that my customer didn't have the subject-matter knowledge that I did. Now I was reminding myself that I was that information and support lifeline for them. I understood my CCR purpose. Applying these new skills had me straying outside my comfort zone and it made me nervous to say the least. I didn't give up. It actually did not take long for me to see that, the more I stretched out of that zone, the easier the call became, in large part because of the rapport I was now able to create. I was changing my VoC history.

The skill of active listening to fully understand what my customers needed also helped me to improve my VoC results greatly this year. Last year, I shied away from probing too much. I would rely on what my caller told me at the outset of the call in order to understand their question. For some reason, I was nervous about asking probing questions and, as a result, I often skimmed the surface in resolving their issue, or I missed it altogether. Through coaching, I learned that I can only truly help my customer if I really have a good understanding of the issue. Without that common ground, I wasn't helping my customer and I wasn't doing my job.

I encourage anyone who is struggling with VoC to not throw in the towel, but instead to take ownership for the quality of customer service you are providing. Your supervisors want to support you and see you succeed but, ultimately, you have to bring your own willingness and resolve to the table, every single day, to make the shifts you want to make.

A PROACTIVE ATTITUDE DISCOVERS NEW BEST PRACTICES

"She has shown a keen interest in listening to her own customer calls to identify opportunities for improvement."

This nominee greatly improved her World Class calls from 2011 to 2012. This is an impressive accomplishment worthy of recognition. At the beginning of this past year, her focus was somewhat distracted. She proactively identified this opportunity and has been openly seeking improvement. She is highly receptive to feedback and implements suggestions immediately. She has shown a keen interest in listening to her own customer

calls to identify opportunities for improvement. From her discoveries, she has created best practices to help her professionally and efficiently navigate through calls. She has quickly positioned herself as a leader and is now recognized for her excellent customer service soft skills and product knowledge. She is extremely personable and approaches each customer with a positive demeanor and an upbeat attitude. She consistently keeps the customer's experience at the top of her mind and articulates her willingness to help on each call. She has expressed that her goal is to treat each customer as she would like to be treated. She takes ownership and accountability for every interaction with each customer ending her calls on a positive note.

These attributes definitely contribute toward her success in providing our customers with world class service. I have witnessed her initiative and dedication to growth and development. She has taken on other roles within our center and, as a result, has expanded her customer service knowledge. She shares this knowledge openly and is now also sought out by other leaders as a resource to help mentor our newly hired employees. As her supervisor, I can attest to her continuous effort and dedication to delivering a positive experience to our customers. I believe that it is behavior like this that influences others to create elevated customer service experiences.

FOCUS ON QUALITY OVER QUANTITY

"Takes her time during the call to ensure that callers felt heard, cared for and helped."

I would like to nominate this individual for recognition as a

customer service representative with excellent World Class improvement scores. During the previous measurement period (October 1, 2010 to September 30, 2011), she had fallen into the fourth quartile for her World Class percentage. In early 2012, she and her team lead had noticed a slow, steady drop in her SQM scores. There was no immediate concern as scores can fluctuate month to month and she maintains excellent internally measured quality. Over a few months' period, she became more concerned as her SQM scores were not improving, and she once again expressed her concerns regarding the scores to myself and her team lead. As a team, we met to discuss her performance, brainstorm ideas as to why there was a slow but steady decline, and try to come up with an action plan. This CSR approached the situation with a strong desire to improve her performance, increase her SQM scores and member satisfaction. She was open to feedback and was willing to work closely with myself and her team lead to identify the heart of the issue and make the necessary adjustments to her workflow.

I asked that she and her team lead begin to meet on a weekly basis to evaluate what was happening with her scores, to identify areas of possible improvement, find where immediate changes could be made and build a long-term plan. During their weekly meetings, she and her team lead listened to her previous calls to identify areas of improvement. They focused on quality over quantity, taking a member-centered approach by having the CSR own each issue a member presented and strive to resolve that issue

in one interaction. She was asked to control her call flow and take her time during the call to ensure that callers felt heard, cared for and helped. In addition to her overall call flow and member-centered approach, they were also able to identify an area of improvement with her vocal tone during her calls. Adding more inflection to her voice and adding a smile to her tone made a world of difference. She also worked with her team lead on adding the appropriate amount of business and human interaction into her call flow, which has helped her to build excellent rapport with her callers.

This was a team effort, which supported a strong desire and a conscious effort on the nominee's part to improve her performance and to service her customers at the highest level. She was open to feedback and was not afraid to reflect on her performance and accept the areas that she needed to change. As a team, we were able to work together to identify the areas of possible improvement and implement the steps needed to support her during this process. All of her hard work and self-reflection paid off. She is now in the first quartile for World Class and is a Certified World Class Representative based on SQM's criteria.

A SHIFT IN FOCUS BRINGS RESULTS

"I stopped thinking ahead and instead focused on handling one call at a time."

Last year, I was very disappointed that I did not achieve World Class Certification. In 2012, I desperately wanted to improve—not only for myself, but for my team. It took a lot of hard work, trial and error, one-on-one mentoring and learning how to ask clarifying questions.

For 2012, my primary focus was resolving my members' needs. I stopped thinking ahead and, instead, focused on handling one call at a time. I have always been empathetic and heartfelt; yet my challenge was learning to listen effectively and ask pertinent clarifying questions, which showed that I understood the caller's needs.

I acted proactively and sought ways to resolve my stumbling blocks. To start, I requested training to improve my critical thinking and listening skills. Through this process, I learned how to represent my member's voice better to resolve their calls. I wanted the member to hear the smile in my voice, and absorb my positive "can do" attitude. I tried different techniques and confirmed what worked best for me. The most helpful was treating each caller as I desire to be treated.

My goals became reality through the constant support and encouragement from my team leads and supervisors. I fine-tuned the knowledge that my team provided and found ways to apply it with an open and receptive attitude. By trying to improve, I became successful in building the members' confidence in my responses; and building confidence in myself. By putting the member first, I learned to proactively resolve my member's needs. In the end, they appreciated that I took the time to walk a mile in their shoes, and took the time to personalize each call.

POSITIVELY TRANSFORMING THE CUSTOMERS PERCEPTION!

"The customer's perception of Scotiabank's service was completely transformed following her interaction with the nominee."

This nominee was initially hired as contract staff in February 2010 to provide

support to Scotiabank's retail and small-business customers. She quickly demonstrated her commitment to delivering exceptional customer service and was subsequently made permanent in May of the same year. She is a dedicated, results-oriented employee who is always seeking the best solution to satisfy her customers' needs.

This year, she was committed to improving her World Class certification by focusing on improving her customer engagement. Consequently, several customer commendations were received from customers for the service she provided throughout the year. One customer, in particular, called into the center quite irate and disappointed with the service she had received from the Bank. The customer had attempted to process a payment to a competitor credit card using a Scotiabank check. She received a call from the competitor bank advising her that her account would incur late fees and additional interest charges as the payment she claimed to have sent for processing was never received by the competitor bank. When the nominee received the customer's call, she successfully resolved the issue within the same day by following up with the relevant mid-office personnel at Scotiabank. The customer's perception of Scotiabank's service was completely transformed following her interaction with the nominee. The customer commented on the nominee's outstanding service and her ability to efficiently resolve the issue, which exceeded all the customer's expectations. The nominee no doubt created a memorable customer experience as the customer called just to ensure that the

nominee's supervisor was aware of the interaction and was duly recognized for same. This nominee was promoted in May 2012 following her consistent demonstration of outstanding customer service and her dedication to fostering the same behavior by her colleagues through continuous peer coaching.

REVELATION THROUGH CRITICAL THINKING

"As she examined the purpose of the survey program, her perspective changed."

It started with one call, a very unhappy customer and some rather unflattering customer feedback. At first, this nominee rejected the SQM survey comments. With 12 years of call center experience, a division mentor role and a career filled with accolades and achievement, she felt that this could just be one of those members. But then she listened to the call recording: "I listened and I didn't like what I heard. That's not me. That's not the customer service I expect from myself." That one call gnawed at her. She started looking at her performance a little more critically. Time passed and she began to see the issue. She found herself looking at the service she received from others and that is when everything changed. As she examined the purpose of the survey program, her perspective changed:

"I used to see the survey as a way to evaluate me—not the customer's experience. I was defensive. After some extremely poor experiences of my own, however, I began to see the audits as the only true opportunity a customer has to rate a company's performance. The customer isn't concerned with why a claim is denied or why she has to wait on hold.

She just expects her issue to be resolved—that's it. No excuses. I realized that it's not about me. It's about them. And that's when it clicked."

This revelation changed her approach and her member feedback improved immediately. A customer raved:

"I am very satisfied because she was very knowledgeable. With the things she did not know right off the top of her head, she asked me to hold for a very short period of time and went and checked on to make sure she had all the correct information. She was very personable and did a really good job. I would highly love to get this person back every time I call."

Since February 2012, this nominee has been World Class Certified each month and concluded the certification period with a very high average. She credits her success to her focus on listening and understanding the customer's need, rather than trying to resolve the issue the caller presents and moving on to the next: "I listen so much more intently now than ever before."

Life was good, and then opportunity knocked again. Midway into 2012, she was selected to participate in a skill development opportunity as a CSR Liaison for the Customer Service SQM Review Committee. While on this team, which relatively few CSRs know exist, she came to understand VSP's commitment to world-class customer service:

"I had no idea how much time, energy and effort went into the program. What I once believed was just an evaluation tool, I now see as the backbone of what VSP stands for. The commitment we show to our customers became tangible and real. This is serious business. It

really makes me feel so proud of the company I represent."

Because of her experience with customer service and her work with the committee, she had the opportunity to visit each of the Customer Service team meetings in September and relay the role of SQM and its importance to VSP:

"CSRs had so many questions and I don't think they truly understood just how committed our company is to ensuring that each customer receives the best possible service on every call. After making these presentations, I feel like the CSRs have a much better understanding of VSP's expectations of them and how dedicated VSP is to both our members and our employees."

I wish I could quantify the transformation that took place with this CSR. She provides incredible customer service for each of her callers. She constantly researches and works with business partners throughout the organization to ensure that she resolves her customers' needs. She is a leader within her team, and continually forwards tips and information to her colleagues. Her service is truly world class.

UNDERSTANDING CALLER'S NEEDS HELPS IMPROVE FCR

"She decided her most important objective was to work on her relationships with her callers."

This CSR had a challenging year in 2011, both professionally and personally. At the beginning of the year, she and I met and jointly created her development plan for the year. She is our most improved CSR in the call center! This nominee has been a CSR with us for 13 years. She aspires to become a CSR who handles both phone calls and claims processing; these positions are

highly sought after.

First, she needed to improve her performance to be successful in her current role and to be competitive to reach her goal. She said she didn't want to leave her CSR position because she loved working with her callers. So, together, we looked at her SQM scores and her other performance goals. She decided that her most important objective was to work on her relationships with her callers. She focused all her efforts on making sure that she was giving the best service she could while showing her callers that she cared. She worked on understanding her callers' needs and resolving their issue on the first phone call. If she told someone she would call them back later that afternoon, she kept her word. She was diligent about remaining current on call center changes to policies and procedures to ensure that she gave correct information on every call. She not only improved her relationships with her callers, she also improved her overall performance. She is on her way to becoming a hybrid CSR and she knows that by improving her caller's experience, she will be a more competitive candidate. I am very proud of the hard work and determination she has demonstrated to become a better CSR for herself and VSP.

NOT WHAT YOU SAY, BUT HOW YOU SAY IT

"I started thinking about how I would like a call to go if I was the one calling in for assistance."

I began my career at Sun Life Financial in the call center almost two years ago. Going into this job, I had four years of previous call center experience, but I had never dealt with retirement products, not even in my own life experiences.

There was so much to learn and I was extremely nervous to start taking calls after training. Each day did become easier, but there was still a lot to learn and skills to develop. My first year, I was lucky enough to just make the cut to be a World Class Certified Representative. It came down to my very last survey! Had it not been rated World Class, I would not have been certified. Imagine that! This frightened me, as customer service has always been so important to me. Not being a World Class Certified Representative was not an option for me! I remember coming into work and my supervisor was smiling ear to ear with the news that my last survey came in and I did it, I was officially World Class Certified! All my hard work in that first year paid off. I was very proud of my accomplishment! Being World Class Certified was the boost of confidence that I really needed to get to steer me in the right direction.

This year, just making that cut, for me, would not be option. It was my goal to be consistently above the target. I wanted to ensure that I wasn't going to be in the same position as the prior year—stressing over whether or not I was going to be certified. As I said, in my mind, not being certified is not an option for me! I started thinking about how I was handling my calls. Was I really listening to my customer? Was I demonstrating empathy where necessary? Was I expressing how I was going to help them resolve their call? Was I being as polite as I could be? Although I could comfortably answer yes to those questions, deep down, I knew that I could be doing better.

I started thinking about how I would like a call to go if I was the one calling in for

assistance. I would want the person on the other end to express that they understood my issue and that they were there to help. After thinking this through and applying my newfound insight, I started noticing a huge difference in how I was speaking to our customers. I began answering the phone with a bubbly tone of voice and a smile on my face. I ensured that I was being polite and using my manners, saying “please” and “thank you” when appropriate. As soon as the member would express the reason for their call, I would paraphrase it back to them to acknowledge that I heard what they needed and that I also understood. Then I would state my willingness to assist by saying things like, “I can most definitely assist you with that today,” and, “Absolutely, I will take care of doing that for you.” I started to realize that it’s not what you say, it’s how you say it! Positive words are the key.

Sometimes I have to deliver “bad news” (it’s inevitable), but I found that, by using positive wording, empathetic tones and stating what I can do, I was able to turn these calls into great member experiences. The World Class calls started coming in month after month. I was feeling great and there was no way I was going to stop what I was doing, it was working! My supervisor also provided me with the opportunity to mentor new-hires. This was a turning point in lifting my confidence. I also had the opportunity to listen to calls and do some coaching with my peers. This was an amazing way to really live and breathe extraordinary customer service!

Along with changes to the way I was handling my calls, my supervisor was also doing a great job supporting me along

the way. She noticed the change in my calls and would frequently compliment me on how polite I was on the phone. She knew that I was passionate about my job and passionate about creating a pleasant member experience on each and every call, and my SQM results were proving it. My colleagues were noticing, too, and commenting on my politeness and how nice I was on the phones. It was great to get this feedback from coworkers.

My supervisor had a senior representative sit with me to listen to my calls, as my call length appeared to be high. I was still struggling with confidence in the knowledge category because I was so afraid that I would give the wrong information and impact a member’s experience negatively. The representative who sat with me acknowledged that I was handling my calls perfectly! He encouraged me by observing that I know what I am doing and to stop second-guessing myself. This was the major boost in self-esteem that really helped me to know that I am doing a good job. I began second-guessing myself less and less and, sure enough, my call time improved.

I can confidently say that confidence is no longer an issue for me! I am proud to be working in an environment where I can be part of resolving customers’ concerns and helping them to achieve peace of mind. It is very rewarding to see a survey come in with a comment like, “She was very informative, very helpful. She was very polite, helpful and just answered all my questions and put my mind at rest.” Those comments continue to be another huge part of the motivation that keeps me focused on providing the best

service I possibly can. I am proud to say that this year it did not come down to my last survey. I worked hard to reach my goals to ensure that this would not be a concern. My hard work and dedication has increased my World Class rating, and I can proudly say that I am a World Class Certified Representative for 2012!

HUMILITY DOES NOT GO UNNOTICED BY THE TEAM

“Though she was very humbled by this accomplishment and kept it quiet, her team wouldn’t let it go unnoticed.”

It is with great pleasure that I nominate this CSR for the World Class Call Improvement Award. Wow! What accomplishments she has achieved this last year. Each caller was “very satisfied” with her; each person said that she resolved the reason for their call; and each caller said that they definitely would continue to use our company’s products and services. At the beginning of this certification period, she declared her goal to achieve 100% on all her surveys. She has a strong desire to provide World Class Customer Service, as well as achieve first-call resolution and caller satisfaction on each call. How did she accomplish this? She incorporated the following elements into her call handling:

- Extends herself to our Providers or Clients and, when necessary, researches inquiries to ensure that she resolves the call. Her focus is not to have the caller walk away with an action item.
- Anticipates questions the caller may have to ensure that she addresses all questions.
- Keeps a smile on her face during each call.
- Identifies with her

callers—even making them laugh when appropriate.

- Makes suggestions to the caller on how to best utilize their benefits to meet their needs.

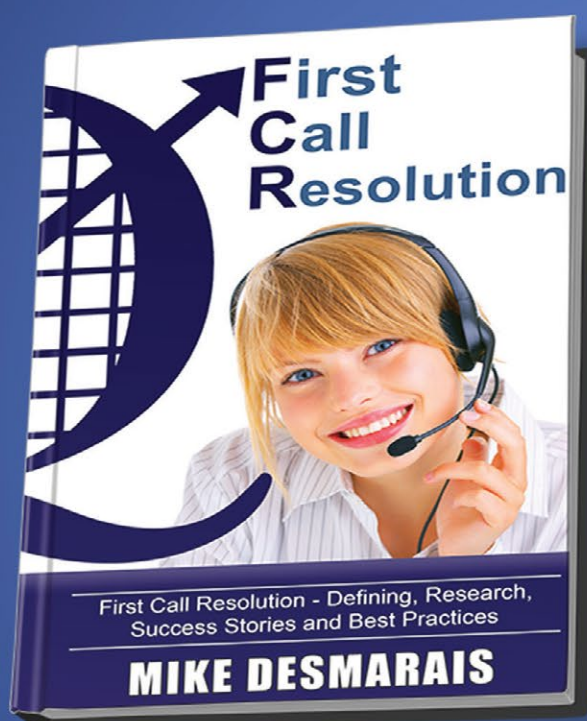
In the comment section on her SQM Report Card, common themes used by her callers to describe their experience with her include: knowledgeable, efficient, friendly and helpful. She takes great pride when she reads the comments on her surveys. Examples include:

“She was very helpful and went above and beyond what I was calling about.” “She helped me review some benefits, as well as locate a doctor and reset my password for VSP online service. She was very helpful. I was impressed.” “Some of the best customer service I’ve had lately.” “She was extremely courteous, knowledgeable and patient. I didn’t get the feeling she was trying to rush me off the line.” “She was everything you would want. She was extremely courteous, very knowledgeable and patient.” “You should give some consideration to increasing that young lady’s salary because she is a credit to your organization.” “She stuck with me the whole time, very easy to work with, very friendly.” “She took care of me and solved my problems. I didn’t have to do it myself.” “She was very helpful and pleasant to work with. Thank you very much.”

Though she was very humbled by this accomplishment and kept it quiet, her team wouldn’t let it go unnoticed. To celebrate, her team decorated her desk; each wrote her a note and they gave her a big congratulatory balloon and flower arrangement.

SQM's new book, *First Call Resolution*, shares research and best practices for improving FCR performance

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- *Belinda Alexander, Vice President, Contact Center Operations, GMAC Mortgage*

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- *Tom Brennan, PMP, CHDM, FCR Champion, Marriott International*

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- Washington, DC – March 20-21
- Toronto, Ontario – April 17-18
- Coeur d'Alene, Idaho – April 24-25

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SQM Contact: Julie Shields (800-446-2095)

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CALL CENTER FCR EXPERTS

SINCE 1996, SQM has been a leading North American call center industry research firm and FCR expert for improving organizations' first-call resolution, operating costs, employee and customer satisfaction. We have done this by being operationally excellent at benchmarking, tracking, consulting and recognizing our clients' first-call resolution (FCR), employee (Esat) and customer (Csat) satisfaction performance. Over 70% of our tracking clients improve their FCR and operating costs year over year. For the average call center that SQM benchmarks, a 1% improvement in their FCR performance equals \$256,000 in annual operational savings.

SQM offers four different post-call surveying methods (i.e., phone, IVR, email and SMS). Our post-call 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-call survey methods can be integrated into one common database. We can also survey within five minutes of the customer's call without having to rely on a call transfer into our technology. Our call list 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%.

SQM is recognized by the call center industry as a leading research firm Voice of the Customer (VoC) expert for analyzing FCR, Csat, and customer experience performance. Our research analyst professionals have strong mathematical academic backgrounds. They also understand the call center industry and stay current with the best practices for capturing, analyzing and reporting VoC data and feedback. Specifically, SQM research analysts use VoC metrics such as FCR, Csat and the Customer Protection – CP SCORE™ to truly understand how your call center impacts the customer service experience, operating costs and the ability of the call center to retain customers.



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