



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 2013.

The insights we've gained through our 12-year partnership with SQM have assisted our call center in sustaining our world class reputation.

Congratulations:

Susan Elkins – CSR of the Year, Finalist

Shelly Limpach – Supervisor of the Year, Finalist

Bilal Coleman and Kimberly Bloomfield –
World Class Improvement Award Winners

2013 Awards

- Call Center of the Year Finalist
 - Call Handling Real-Time CSR Support Finalist
 - Call Center World Class Certification
 - Winner for Highest Customer Satisfaction by Industry: Insurance
 - Winner for Highest Customer Satisfaction: Business to Business
-



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LETTER FROM SQM'S PRESIDENT & FOUNDER

**SQM's 15th Annual Most Prestigious North American Call Center
Industry 2013 Awards for Service Quality Excellence Program**



THANK YOU for choosing to attend SQM's 15TH ANNUAL MOST PRESTIGIOUS NORTH AMERICAN CALL CENTER INDUSTRY 2013 AWARDS for Service Quality Excellence. As a result of benchmarking in excess of 450 call centers and surveying more than 1 million customers and 25,000 CSRs on an annual basis, SQM is pleased to announce our 2013 award-winning call centers and frontline employees.

At this year's awards ceremony, we will recognize 45 organizations with 49 different awards including Call Center of the Year, World Class Certification, First Call Resolution (FCR) Improvement, Highest Employee Satisfaction (Esat), Highest Customer Service, FCR Leadership, FCR Champion, and Industry Best Practice Awards.

We will recognize the Top 11 World Class CSRs Finalists who are the "best of the best" Certified World Class CSRs, and of those 11 CSRs, we will announce the 2013 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 2013. Also, we will be recognizing the Top 6 World Class Supervisors who are the "best of the best" Certified World Class Supervisors, and of those 6 Supervisors, we will announce the 2013 Supervisor of the Year. The Supervisor of the Year will also 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.

This year, we recognized organizations that have demonstrated a best practice that they have used to improve or help maintain high FCR performance. We have 5 different Best Practice awards (i.e., Recognition Program, Knowledge Management Tool, Career Advancement, Quality Assurance, and Call Handling Real-Time CSR Support Queue).

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

Sincerely,

Mike Desmarais
President & Founder | SQM Group





CALL CENTER OF THE YEAR AWARD

FINALISTS



■ **CANADIAN TIRE FINANCIAL SERVICES (CRCC)**



■ **ENMAX CUSTOMER CARE**



■ **VSP VISION CARE**

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.

BEST PERFORMING (SMALL/MID SIZE) CALL CENTER AWARD

FINALISTS

- BC Automobile Association (BCAA)
- Canadian Tire Financial Services (PDG)
- 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

RECIPIENTS

- BC Automobile Association (BCAA)
- Blue Cross Blue Shield of Kansas
- Jackson
- Ontario 211
- Scotiabank International (Dominican Republic)
- Scotiabank International (Jamaica)
- Scotiabank International (Trinidad and Tobago)
- Rogers Enterprise Service Delivery
- VSP Vision Care (California & Ohio)

THE CRITERIA: Criteria used for Call Center World Class Certification are 80% or higher of the calls are at the world class level for 3 months or more. SQM's world class call 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.

BEST PRACTICES AWARD FINALISTS

RECOGNITION PROGRAM FINALISTS

ORGANIZATION

- BlueCross BlueShield of South Carolina
- DTE Energy
- 407 ETR

THE CRITERIA: These awards recognize the organization that has demonstrated they have improved or helped maintain high first call resolution and customer satisfaction performance. Organizations submit specific practices they have used to improve or maintain high first call resolution (FCR) and customer satisfaction (Csat) performance.

KNOWLEDGE MANAGEMENT TOOL FINALISTS

ORGANIZATION

- Comcast Cable
- TELUS Sourcing Solutions Inc.
- University of California Davis Health System

THE CRITERIA: These awards recognize the organization that has demonstrated they have improved or helped maintain high first call resolution and customer satisfaction performance. Organizations submit specific practices they have used to improve or maintain high first call resolution (FCR) and customer satisfaction (Csat) performance.



BEST PRACTICES AWARD FINALISTS

CAREER ADVANCEMENT FINALISTS

ORGANIZATION

- ENMAX Customer Care
- Starwood Hotels & Resorts Worldwide Inc.
- Rogers Business Care

THE CRITERIA: These awards recognize the organization that has demonstrated they have improved or helped maintain high first call resolution and customer satisfaction performance. Organizations submit specific practices they have used to improve or maintain high first call resolution (FCR) and customer satisfaction (Csat) performance.

QUALITY ASSURANCE FINALISTS

ORGANIZATION

- Scotiabank Jamaica
- UPMC Health Plan
- Scotiabank Mexico

THE CRITERIA: These awards recognize the organization that has demonstrated they have improved or helped maintain high first call resolution and customer satisfaction performance. Organizations submit specific practices they have used to improve or maintain high first call resolution (FCR) and customer satisfaction (Csat) performance.

CALL HANDLING REAL-TIME CSR SUPPORT QUEUE FINALISTS

ORGANIZATION

- C Spire Wireless
- VSP Vision Care
- Starwood Hotels & Resorts Worldwide Inc.

THE CRITERIA: These awards recognize the organization that has demonstrated they have improved or helped maintain high first call resolution and customer satisfaction performance. Organizations submit specific practices they have used to improve or maintain high first call resolution (FCR) and customer satisfaction (Csat) performance.

CSR FINALISTS FOR CSR OF THE YEAR

FINALISTS

CSR NAME

ORGANIZATION

- | | |
|------------------------|--|
| ▪ Aidan Lyall | ▪ Canadian Tire Financial Services |
| ▪ Jo-Ann Topolinsky | ▪ Canadian Tire Financial Services |
| ▪ Joslyn Knight Cherry | ▪ CareFirst |
| ▪ Lynn Desouza | ▪ Sun Life Financial |
| ▪ Max Tardie | ▪ BlueCross BlueShield of Vermont |
| ▪ Pamela Cragin | ▪ BlueCross BlueShield of South Carolina |
| ▪ Rachael Clarke | ▪ TELUS Sourcing Solutions Inc. |
| ▪ Sarah Pollard | ▪ BlueCross BlueShield of Vermont |
| ▪ Susan Elkins | ▪ VSP Vision Care |
| ▪ Tara Gray | ▪ Sun Life Financial |
| ▪ Wendy Cleversey | ▪ Millennium1 Solutions (PC Bank) |

THE CRITERIA: To be eligible the customer representative must be a World Class Certified customer representative. The criteria for a Certified World Class Customer Representative is 80% or higher of the calls surveyed are at the world class call level. Call center management must also send an example of a great customer service story that the CSR delivered.

CSR TOP 10 WORLD CLASS CSAT IMPROVEMENT WINNERS

RECIPIENTS

CSR NAME

ORGANIZATION

- | | |
|---------------------------|---|
| ▪ Bikki Wong | ▪ Rogers Business Care |
| ▪ Bilal Coleman | ▪ VSP Vision Care |
| ▪ Kimberly Bloomfield | ▪ VSP Vision Care |
| ▪ Lucie Novotny | ▪ Sun Life Financial |
| ▪ Manuel Liriano | ▪ Scotiabank International (Dominican Republic) |
| ▪ Maya Miranova | ▪ Rogers Business Care |
| ▪ Mitchell Dronfield | ▪ Sun Life Financial |
| ▪ Sonia Macri | ▪ Rogers Business Care |
| ▪ Travis Kritsch | ▪ Sun Life Financial |
| ▪ Varleen Glennycia Rymer | ▪ CareFirst |

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



SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

FINALISTS

SUPERVISOR NAME	ORGANIZATION
Amyn Sumar	ENMAX Customer Care
Karen Lyons	Highmark
Marc Albert	Sun Life Financial
Patricia Nieusma	BlueCross BlueShield of Vermont
Shelly Limpach	VSP Vision Care
Wendy Chevrette	Canadian Tire Financial Services

THE CRITERIA: To be eligible the supervisor must be a World Class Certified supervisor. The criteria for a Certified World Class Supervisor is 80% or higher of the calls surveyed are at the world class call level, in which customers are overall very satisfied (top box response) with their call center experience, very satisfied with the person who handled their call and that the call was resolved. Call center management or CSRs must also send an example of a great Call Resolution or Csat coaching story.

CUSTOMER SATISFACTION & FIRST CALL RESOLUTION AWARDS

HIGHEST CUSTOMER SATISFACTION FOR THE CALL CENTER INDUSTRY AWARDS

ORGANIZATION	AWARD
U.S. Bank – 24 Hour Banking	Best Selling Customer Satisfaction ¹
TD Canada Trust	Highest IVR Customer Satisfaction Self Serve ²
Cogeco Cable (Quebec)	Highest IVR Navigation to the Right CSR ³

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.

HIGHEST CUSTOMER SERVICE BY INDUSTRY AWARDS

THE CRITERIA:

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

ORGANIZATION	INDUSTRY
TD Bank, America's Most Convenient Bank	Banking
Jackson	Financial
Canadian Tire Financial Services (CRCC)	Credit Card
VSP Vision Care	Insurance
Blue Cross Blue Shield of Kansas / Regence Blue Shield of Washington	Health Care
OfficeMax (Grand&Toy) Canada	Retail/Service
ENMAX Customer Care	Energy
Cogeco Cable	Telco/TV (Consumer)
Rogers Enterprise Service Delivery	Telco/TV (B2B)
Insurance Corporation of BC	Union
CNH Industrial Parts & Service	Helpdesk
Region of Halton	Government
VSP Vision Care	Business to Business

HIGHEST CLAIMS EXPERIENCE SATISFACTION AWARD

ORGANIZATION
Florida Blue

THE CRITERIA: This award recognizes the call center with the highest customer satisfaction (top box response) rating for claims experience.

FIRST CALL RESOLUTION IMPROVEMENT AWARDS

THE CRITERIA:

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

ORGANIZATION	
BlueCross BlueShield of South Carolina	Scotiabank International (Trinidad and Tobago)
Canadian Medical Association/MD Physician Services	Scotiabank International (Peru)
Enbridge Large Business Accounts	Scotiabank International (Mexico)
OfficeMax (Grand&Toy) Canada	ScotiaLife Financial
Highmark PA (MTM)	TD Canada Trust (Investing)
Marriott (One Yield)	TELUS Sourcing Solutions Inc. (Alberta Health Services)
Nationstar Mortgage	Triple S Salud
Reliance Protectron Security Services	



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.

MOST IMPROVED EMPLOYEE SATISFACTION

ORGANIZATION

- ENMAX Customer Care

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

HIGHEST EMPLOYEE SATISFACTION BY INDUSTRY AWARDS

ORGANIZATION

AWARD

- | | |
|----------------------------------|-------------|
| Arizona Public Service | Energy |
| Canadian Tire Financial Services | Financial |
| BC Automobile Association (BCAA) | Insurance |
| Blue Shield of California | 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

- Scotiabank

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

WORLD CLASS EMPLOYEE SATISFACTION AWARDS

ORGANIZATION

- | | |
|---|-------------------------------|
| Arizona Public Service | ENMAX Customer Care |
| BC Automobile Association (BCAA) | Scotiabank |
| Blue Shield of California | TELUS Sourcing Solutions Inc. |
| Canadian Tire Financial Services (CRCC, PDG, CCR, CSG and CSEC) | |

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

FCR LEADERSHIP AWARDS

RECIPIENTS

FCR LEADER NAME

ORGANIZATION

- | | |
|----------------|--|
| Vicki Whichard | BlueCross BlueShield of South Carolina |
| Mike Miller | 407 ETR |

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

FCR CHAMPION AWARDS

RECIPIENTS

FCR CHAMPION NAME

ORGANIZATION

- | | |
|-----------------------|---------------------|
| Bernadette Victorelli | Highmark PA |
| Cheryl Case | Florida Blue |
| Austin Cobb | Nationstar Mortgage |

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



SQM'S 15TH ANNUAL MOST PRESTIGIOUS NORTH AMERICAN CALL CENTER INDUSTRY 2013 AWARDS FOR SERVICE QUALITY EXCELLENCE PROGRAM

SQM IS PLEASED TO ANNOUNCE our 2013 award-winning call centers and frontline employees. This is SQM's 15th Annual Most Prestigious North American Call Center Industry 2013 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 over 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 January 1st, 2013, to December 31st, 2013. SQM has 49 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 2013 Conference on April 16th in Washington, D.C.

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 2013 Conference on April 16th in Washington, D.C.

Criteria used for Call Center World Class Call Certification are 80% or higher of the calls are at the world class level for 3 consecutive months or more in 2013. SQM's world class call 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.

In 2013, SQM introduced a new type of award to recognize FCR Best Practices. The categories for these 5 awards were: Recognition Program, Knowledge Management Tool, Career Advancement, Quality Assurance, and Call Handling Real-Time CSR Support. These awards recognize the organization that has demonstrated as a result of their best practice that they have improved or helped maintain high first call resolution and customer satisfaction performance. Submissions were invited from clients and non-clients through an on line application and were judged by a panel of 6 subject-matter experts to determine the finalists and winners.

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

#TRUEBLUE

Congratulations to C Spire's customer care team for living the essence of the trueBLUE philosophy. You demonstrate uncompromising commitment to customer advocacy by ensuring customer needs are resolved in one call, yielding stellar customer satisfaction results. You are the flame that ignites employee and customer advocacy.

Thanks for demonstrating world class personal service and innovation.



Call Center of the Year Finalist:

CANADIAN TIRE FINANCIAL SERVICES CUSTOMER RELATIONSHIP CONTACT CENTER



AT CANADIAN TIRE FINANCIAL SERVICES, delivering consistently high-quality service experiences is a philosophy that is woven into the fabric of the organization's "Customers for Life" culture. Every representative at its award-winning Customer Relationship Contact Center (CRCC) is fully aligned with the mission to deliver world class customer service, and is accountable for first call resolution (FCR) and customer satisfaction.

A look inside the CRCC reveals a best-in-class contact center with consistently high FCR performance and employee engagement. Some of the elements that contribute to this customer-driven environment include:

- A solid employee connection: The average tenure for a call center rep is 12 years. One reason why employees tend to stay is that their input is valued and acted upon—especially when dealing with process improvements that involve customers and efficiency.
- Highly empowered front line: First call resolution is a core component of its Customers for Life culture. Call center reps understand that taking care of the customer's needs is the top priority, and they are empowered to take the time to satisfy their customers.
- Process improvements driven by employees: Frontline staff are also actively involved in improving FCR and reducing customer effort. They participate on process improvement project teams from the initial idea generation and input stages through to the solution design.
- Customers for Life culture reinforced daily through team and peer recognition activities: One of the most visible mechanisms is the Customers for Life awards, which serves as both an individual commendation for promoting the culture and a companywide reminder of the importance of making the right choices for the customers. It is a peer-nominated award, open to both customer-facing and back-office staff.
- Strong connection to the local community: As one of the major employers in the Niagara region, the organization extends its Customers for Life culture to the local community. In fact, the focus on investing back into the community is another key contributor to its high employee satisfaction and longevity.

It's a winning combination, to be sure. Yet the CRCC is not one to rest on its past achievements. The center continuously improves its performance year after year by reviewing and recharging processes and programs, according to Associate Vice President of Customer Service David Schlumberger. In the past

12 months, the center focused on revitalizing a voice of the customer program that management felt had begun to concentrate too heavily on call categorization and analytics. "It was losing some of the passion and excitement that we tend to create around customer service and our culture," he explains.

In 2013, CRCC management rolled out its "Customer Experience Matters" program to get frontline reps engaged in driving process improvement. Staff works closely with management to provide their input through brainstorming, feedback sessions, action planning and follow up. "It's a little more true to our culture. It helps us to experience what our reps are feeling so that we can drive change and improvements to help them to provide outstanding service to our customers," Schlumberger says. "We want to be closer to the customers and closer to our reps—they're our greatest advocates."

Last year, Canadian Tire also turned to the power of sport to generate excitement in the workplace. As a Premier National Partner of the Canadian Olympic Team, the organization tied the Olympic theme to the Canadian Tire brand through various events and communications that stressed to frontline staff the importance of their role as the face of the brand. "The pride that they have in the work that they do translates into higher performance," he says. "It's a people-focused approach versus a systemic process improvement effort."

Overall, consistency is the key to the CRCC's strong performance, Schlumberger says. "We try to avoid chasing 'flavors of the month.' Our Customers for Life culture is the overarching strategy for how we communicate with our reps. We don't deviate from that—we align all of our programs and activities around it to ensure that we remain consistent to the values we believe in."

That solid foundation and reputation helps the center to attract and retain top talent at all levels, he adds. "The fact that our people truly care about delivering quality customer service is an incredible strength. We have tenured reps who have a great deal of knowledge, so we don't have to always rely on technology solutions to get things done. It's a very nimble environment, which is ideal in the financial services industry where things are constantly changing. It's amazing to see our people continue to deliver and take care of our customers, year after year, no matter what the circumstances."



DAVE SCHLUMBERGER



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*- Jane Havens
Director of Operations,
Member Benefits Administration,
BlueCross BlueShield of Tennessee*

Call Center of the Year Finalist: ENMAX CUSTOMER CARE



MOST CUSTOMERS don't spend a lot of time thinking about their energy provider. It's a service that is essential to daily living, yet the companies that provide it with a high degree of reliability become virtually invisible to the end user. "Our customers expect the electricity to be there when they flip the switch. Energy is not a sexy product like a smartphone or a tablet, so we're in an interesting position where people don't get excited to talk to us," says Dave Raposo, Operations Manager, Customer Care at ENMAX. However, he adds, "When they do need to contact us, they want it to be quick and seamless."

ENMAX's vision is to go beyond that basic expectation to deliver exceptional world class customer care—which is defined by the customer's satisfaction with the CSR's performance, the overall contact center experience and that the issue was resolved from their point of view. First call resolution (FCR) is a key ingredient of a quality experience in an industry where reliability is absolutely critical, and ENMAX's Customer Care management reinforces that message continually in meetings and communications with frontline employees. Emails about process changes or updates include a message at the end that explains the impact on FCR so that everyone can understand the reason behind the changes, says Raposo. In addition, management sends out regular updates with the previous month's FCR results and highlights key call trends that may be impacting FCR with tips for handling those call types.

Public recognition of individual performance also keeps employees focused on driving FCR and service excellence. The Customer Care team celebrates employees who have achieved World Class Call status each month, and the center's Wall of Fame provides a daily visual reminder with photos of all employees who have achieved World Class Call Certification for the year.

The Customer Care team itself has won multiple awards for FCR improvement, and has made remarkable jumps in overall FCR in 2012 (79%, up from 64% in 2011) and 2013 (82%). Raposo attributes these past FCR increases to a centerwide push to clear a backlog of requests stemming from a new billing system deployment, as well as the establishment of a taskforce to review the center's processes and identify those that were not contributing to FCR. "We met with our frontline employees regularly to get their feedback on the processes that frustrated them or that they had to hand off," he says.

More recently, the center has set up quarterly FCR Champion Teams to focus on continuous improvement. The teams are comprised of a quality assurance rep and two team leads who spend three months analyzing SQM survey results, reviewing calls and drilling into the data to determine the main drivers of those calls that are not resolved on the first contact. The FCR Champion Team meets on a monthly basis with training, quality and operations management to present their findings and offer key takeaways for each area on how to improve FCR.

ENMAX enjoys the distinction of being recognized as one of Alberta's Top Employers, so it is no surprise that employee engagement is a top priority. Employee satisfaction surveys are viewed as critical feedback for driving improvement in the processes that impact engagement and the work environment. Similar to FCR improvement, the management team has made notable increases in employee satisfaction using a taskforce-type approach. The team prints all verbatim survey comments for each leader to review, and schedules a full day to go through the results, discuss the comments, look for trending topics and come up with an action plan to change the processes that negatively impact employee satisfaction. The team then meets with the frontline groups and reviews the plan with them before implementing it. If the next employee survey doesn't show significant improvement, the process is repeated.

What types of changes has this approach generated? Employee committees, for one. Contact center employees wanted to see more activities like bake sales and celebratory events, Raposo says. The committees provide a structure for those activities.

Another key improvement focused on career development. To provide employees with information about growth opportunities, the management team repurposed a coaching room into a career room. They installed computers and a career library consisting of training materials and binders with job descriptions for all areas of the company. "Employees can go in there to do some research and learn about other career possibilities," Raposo says. He adds that, over the past year, 15 employees were successfully placed in other roles within the organization.

For those employees who want to grow into leadership positions, management created a program called LEAP (Leadership Enrichment and Accreditation Program). It's a structured, self-paced program that provides employees with leadership training and exposure to various leadership roles. "Employees have the opportunity to sit in with various departments to gain a better understanding of what different areas of the organization do," he explains. In addition, when a team lead goes on vacation, "we'll have someone in the LEAP program take over that role so that they can get hands-on leadership experience."

Overall, Raposo credits ENMAX Customer Care's continuous improvement culture for the center's FCR performance and employee satisfaction improvements. "If you have a culture that encourages and rewards that type of thinking and behavior, then people feel safe to identify process breakdowns and call out the things that could be improved," he says. "We have a lot of people who are passionate about providing excellent customer care. It's important to them. When you partner passion with a drive to always be better, it's very powerful."



DAVID RAPOSO



Get Smart, Get Social with Social Customer Service

Please find in your conference bag a folder containing:

- Executive Brief: Customer Service Gets Social
- Ovum Research: Oracle's CX Portfolio Gathers Pace, Increases Reach Beyond the Enterprise

The Smartest Solution is a Social Solution

81% of business executives now recognize that effectively leveraging social media creates a great customer experience, which leads to:*



Improved
Brand Image



Increased
Retention
and Sales



Greater
Customer
Loyalty



* Oracle, "Global Insights on Succeeding in the Customer Experience Era," February 4, 2013.

Call Center of the Year Finalist: VSP VISION CARE



VSP VISION CARE, one of four innovative companies comprising VSP Global, has prided itself on delivering a consistently high-quality service experience for customers throughout the years. The international eyecare benefits provider has been devoted to driving value-added, easy-to-use and easy-to-understand products and services for nearly 60 years. The Customer Care center's consistently high performance is evidenced by a lengthy list of accolades and recognition, including multiple Customer Satisfaction and Call Center of the Year awards.

"We are absolutely customer-centric, and we have been since we were founded in 1955," says Janet Calloway, Manager, VSP Customer Care. "We believe in creating low-effort experiences for our customers. Our role in customer service is to deliver on that strategy and to make that path easier for customers. Our premise is, don't leave customers with a to-do that we can take care of for them."

VSP's emphasis on driving customer satisfaction and continuous improvement permeates the organization's culture. New employees are immersed in customer-centricity from Day 1. During classroom training, new-hires learn about VSP's service strategy, first call resolution (FCR) and the role that CSRs play in member retention and business success. "We reinforce the importance of looking at every single contact as one that will influence the perception of that member about VSP," says Calloway. That message is also delivered by VSP's top executives, including the CEO and president, who spend time in the classroom talking to new-hires about the role that they play in the business's growth and success.

Importantly, frontline staff has the authority to solve problems and are actively engaged in monitoring their own performance. "CSRs have full access to their scorecards so they can monitor their performance real-time," she explains. "They are able to review their surveys, listen to the phone calls with their supervisors, and schedule time off the phones to listen to customer feedback."

Over the past 24 months, VSP has transformed the role of its quality assurance resources to further pave the way for high FCR. Instead of simply monitoring calls for CSR performance metrics, the QA team also listens for customer experience improvement opportunities. "We're using our QA resources to do a deep-dive into repeat calls," says Calloway. "We're not just listening to that one call in which an issue wasn't resolved. We're going all the way back to look at that entire experience to identify key themes and opportunities to improve business processes."

For the QA team, the transition has been a learning experience—one that initially required additional training. "It's one thing to

score a call against specific metrics. It requires a different mindset and approach to listen for the customer experience and to identify what is happening in the business process and self-service tools," she says.

Last year, the contact center also turned its process improvement eye to other internal touchpoints within the customer journey. "We developed a 360-view of the contacts in which our CSRs had to reach out to our internal help desk for assistance," Calloway says. The management and QA teams began to evaluate the help desk calls, tracing each step back to the front-end customer inquiry to help determine what drove the initial contact, and at which specific points there existed opportunities for improvement.

The frontline also has been actively involved in performance improvement—both on an individual and organizationwide level. Customer Care leadership launched a strategy called Plus One—the idea being that, if each individual could do one thing to improve his or her own performance, the combined effort would greatly enhance overall business performance. Every employee identified a Plus One Commitment for the year, which they were rewarded for achieving. "It seemed so simple, but it helped to rally everyone for an important cause and it generated a great deal of enthusiasm and excitement," Calloway says.

Kathy Rodine, VP of Customer Care, adds, "The effectiveness of these commitments is demonstrated in our ability to maintain strong FCR performance at a time when we were experiencing real growth and change in our business, resulting in 30% new staff."

"VSP strives to provide a great work environment where all employees believe they have the tools and support needed to deliver on our goal of providing world class service," offers Rodine.

In fact, Customer Care Center employees continually give high marks to their supervisors in nearly every related attribute that is measured, says Calloway. VSP's reputation for being a great place to work helps to attract strong talent with the call center being a fantastic recruitment source for positions across VSP Global. Not surprisingly, tenure is high at all levels of the organization—and is another key contributor to the center's high performance. "Over 90% of our eligible CSRs have achieved Customer Representative World Class Certification this year, which is phenomenal," Calloway says. "That is a very powerful message from our customers."



KATHY RODINE



JANET CALLOWAY



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Best Performing Small/Mid Size Call Center Finalist: BRITISH COLUMBIA AUTOMOBILE ASSOCIATION (BCAA)



PROVIDING CUSTOMERS with not merely a good experience but an amazing one on every single interaction sounds like a tall order, but that is exactly what sets British Columbia Automobile Association (BCAA) apart. BCAA is a modern, forward-thinking automobile club and insurance provider to more than 800,000 members. “We strive to deliver a consistently amazing Member experience by being true to our three Member Experience Principles during every interaction,” says Kelven Wong, Senior Manager, Contact Center & Web. Those are connect, be amazing and show appreciation. As Wong explains:

“At each interaction, we will **connect** with our Members by understanding what it takes to meet their needs. We want our Members to feel that we are Trustworthy, Friendly, Helpful.

“To us, an **amazing** experience means that we consistently meet our Members’ high expectations, anticipate future wishes and trigger a unique emotional connection to BCAA. We will be amazing by proactively solving problems, offering support and making recommendations whether we’re behind the scenes or Member-facing.

“To complete an amazing experience, we’ll consistently provide genuine recognition to **show appreciation** for our Members. We also show appreciation to one another for Member service excellence.”

These three Member Experience Principles are the foundation that underlies BCAA’s culture, as well as its FCR philosophy and goals. “However our Members choose to interact with BCAA—be it face-to-face at our branches, online or by phone—they simply see BCAA,” Wong says. “To our Members, we are one team. To build lifetime Member relationships, we absolutely need to meet our Members’ needs and resolve their inquiries the first time. For our Member contact center, that means first call resolution is an integral part of our vision and our team knows it plays a vital part in meeting our Member experience goals.”

Management reinforces that message in its communications with team members. “We consistently link new initiatives, ongoing targets and operational requirements back to our principles to ensure that everyone has a clear understanding of their role and the importance of their commitment to FCR,” he notes.

The frontline team is provided with ongoing training to ensure that they are always improving on their FCR performance. In fact, over the past year, the contact center has increased its focus on feedback and coaching by involving its elite Member Relations escalation team. Once the team resolves a call that has been escalated, “they will provide feedback to the agent who initially handled the call to facilitate learning and further improvement as we all strive toward first call resolution,” Wong says. “Increasing our focus on feedback and coaching has contributed significantly

to our consistently improving trend for our average calls to resolve metric, which currently exceeds the World Class Call Center Average.”

It’s not just about attaining performance goals. Contact center agents know that, by consistently providing amazing member experiences, they are helping to establish BCAA as one of the most trusted organizations in British Columbia—one that is famous for doing the right thing. And that vision translates into a great working environment.

BCAA’s focus on showing appreciation and doing the right thing extends beyond its immediate customer base to the local communities. The company has a volunteer day program in which employees receive paid time off for volunteering. In addition, employees can participate in an annual workplace fundraising program for local charity (the United Way). In 2013, 59% of employees participated and, with BCAA matching employee donations, raised over CDN\$218,000, Wong says.

The ability to make a difference in their local communities is a cause that has resonated with BCAA staff. In the most recent annual employee engagement survey, 90% of its employees cited the organization’s commitment to local communities and the volunteer programs as one of the reasons why they are passionate about BCAA and which makes it a great place to work, Wong says.

In addition to being a community-minded organization, BCAA is committed to and invests in a variety of social impact programs that focus on road safety and education initiatives. For instance, upon learning that up to 5% of British Columbians don’t use a car seat to transport their children, the organization launched the BCAA Community Child Car Seat program. “BCAA committed to contributing \$100,000 annually to buy 1,000 child car seats (one for each BCAA employee) every year for the next five years,” Wong says. “In its first year, after receiving an overwhelming number of applications from community groups that support families in need across the province of British Columbia, BCAA tripled that investment to almost \$300,000 to better meet the community’s need. As a result, last year, some 3,400 seats were donated for kids who may otherwise not have had safe transportation.”

BCAA contact center staff can be proud of the part that they play every day, and on every call, in helping to make a difference to their Members and the communities where they live and serve. “Our people are our contact center’s greatest strength and a critical pillar of BCAA’s overall Member experience. Our Member Contact Center team is absolutely committed to doing the right thing,” Wong says. “They live and breathe our Member Experience Principles by living a very simple formula: A talented team creating amazing experiences = loyal Members.”



KELVEN WONG

Best Performing Small/Mid Size Call Center Finalist:

CANADIAN TIRE FINANCIAL SERVICES PROFESSIONAL DISPATCH GROUP (PDG)



PART OF THE CANADIAN TIRE FINANCIAL SERVICES ORGANIZATION, the Professional Dispatch Group (PDG) service center lives and breathes the organization's compelling "Customers for Life" vision and culture. As a nationwide, 24/7 contact center for Canadian Tire Roadside Assistance customers, PDG staff deliver compassionate assistance to customers who are often stranded on the side of the road or involved in an accident.

Talking to callers who may be in distress and highly emotional can be a tough job—but it's also a very rewarding one. And it's no surprise that the PDG generates a lot of hero stories for its staff.

"Our reps have a great deal of passion about their work and their connection to their customers," says David Schlumberger, Associate Vice President, Customer Service. For customer service reps in this group, a strong customer connection requires the ability to put themselves in the customer's situation, take full responsibility for the customer's needs, and deliver empathetic care and support.

The roadside business can be particularly challenging during harsh weather conditions, at which times call volumes can widely fluctuate. For instance, during the frequent snowstorms that occurred this past winter, call volume often swelled to six times the amount received on a typical day. For most call centers, that type of spike would spell disaster—but for the PDG, service never wavered.

Schlumberger attributes the PDG's ability to deliver high performance under demanding conditions to highly committed employees who work nimbly and efficiently to ensure that

customers are taken care of. "Their ability to flex up and down relative to call volumes and customer service challenges means that we have very agile people who are comfortable with change and dedicated to the work that they do," he says.

A key initiative in the PDG group this past year focused on connecting frontline staff to the business through an increased focus on customer retention. Customers tend to be of two minds when it comes to roadside assistance programs, in general. Those who have used the service, greatly appreciate it and feel that it is well worth any expense; those who haven't, often ask: Why pay for something I might not use?

Management provided the frontline staff with action plans to help them assist customers through the annual renewal process, as well as tools and offers developed to ensure that customers clearly understood the value of the product.

"It was something that the staff got excited about and completely rallied around," Schlumberger says. The program also resulted in higher customer retention and increased business revenue for the year.

"The PDG staff has had a long track record of delivering high first call resolution and customer satisfaction," he adds. "It's very nice that they finally have an opportunity to showcase their skills and capabilities, and be recognized for the amazing work that they do."



DAVE SCHLUMBERGER

Best Performing Small/Mid Size Call Center Finalist: TELUS SOURCING SOLUTIONS INC.



PUTTING CUSTOMERS FIRST is both an enterprisewide vision and the No. 1 priority of all team members at TELUS Sourcing Solutions (TSSI). The foundation for TSSI's customer-centric culture is built upon leadership values to embrace change and initiate opportunity, have a passion for growth, believe in spirited teamwork and have the courage to innovate, according to Linda McCutcheon, Vice President, Operations. "Within our contact centers that support our client's employees, our team members ensure that the vision becomes a part of everyday practice by adhering to TSSI's Customer First Commitments":

- We take ownership of every customer experience.
- We work as a team to deliver on our promises.
- We learn from customer feedback and take action to get better, every day.
- We are friendly, helpful and thoughtful.

"Alongside our TELUS leadership values, our Customer First Commitments guide our actions and interactions with our customers, and have become an important element of our performance culture," she says. "Our Customer First Commitments drive what we do and our values define how we do it."

First call resolution (FCR) plays a key role in TSSI's focus on its customers. "Measuring, analyzing and improving on FCR are fundamental activities in delivering on our Customer First Commitments," she explains. "We know through our quality program, post-call electronic surveys and deep trending from our CRM tool, who, what and where we need to train, improve or celebrate, as appropriate."

TSSI's collaborative performance development process aligns every team member's efforts and contributions with the contact center's common goals, and ensures that individuals are provided with the growth and learning opportunities they need to be successful. Importantly, contact center leaders discuss individual development progress regularly with their team members. This ongoing focus on performance management helps to promote individual responsibility and creates shared understanding between team members and leaders, McCutcheon says.

Ongoing performance development is supported formally in the contact center by:

- Setting expectations related to a team member's role and TELUS' business needs in meeting the center's Customers First commitments.
- Defining employee-specific learning and development activities that will enable team members to achieve and exceed expectations.
- Assessing performance on an ongoing basis and providing feedback to continually raise the bar.

There are a number of other processes in place to ensure ongoing attention to team member development. How? "By regularly supporting, coaching, developing and recognizing the contributions and efforts of team members consistent with TSSI's

high-performance culture," says McCutcheon, adding that "to support high performance and drive business priorities throughout the year, TELUS uses a suite of online and social media based tools to help team members document, track and share their progress in reaching both their performance and career goals."

With such attention to helping employees achieve strong performance and success, it's no wonder that employee satisfaction is high at TSSI. "We believe that great customer experiences start with great team member engagement, which is why we place a significant focus on 'Fair Process' (ensuring that our team members are a part of all aspects of a change), 'Own-It' (continuous improvement methodology), and annual employee surveys," McCutcheon explains. "Our surveys give us an appreciation of how engaged our employees are. We also use the feedback to build action plans and work with our employees to implement them. This entire approach and process has afforded us with annual results that outshine the typical 'Best Employer's' award criteria. Last year, we achieved 100% engagement, and we have had consecutive wins in our category as Outsourcer and World Class in this same category."

In addition to high employee satisfaction, over the past 12 to 24 months, TSSI has brought about remarkable improvements in its FCR performance by supporting its staff with an extensive knowledge base (to which customers also have access via the website), and just-in-time assistance provided by dedicated staff who sit with the CSRs to answer their inquiries on the spot. The center also has engaged a dedicated call center trainer to support a new training program with checkpoints on weeks 2, 4 and 6, and monthly check-ins with team members to identify any areas of opportunity. In addition, frontline staff receive proactive training based on monthly call trending, mentors who provide real-time coaching (in addition to a quality coach who provides more formal monthly coaching), ad hoc classroom training on pending top topics, and training on tone of voice to ensure that agents communicate in a confident manner.

TSSI also ensures successful customer interactions by providing the front line with integrated systems that allow agents instant access to required data, reducing both additional handoffs throughout the workflow and callbacks.

While the technology and tools, as well as call trending and customer data analytics, help to ensure TSSI continuously improves the contact center's processes, when it comes to delivering on the Customer First Commitment, McCutcheon says that "hands down, the key strength of our center is our people. While each team member has personal passion and fun while delivering on our Customer Commitments, they also display high levels of organizational loyalty."



LINDA MCCUTCHEON



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FCR Leadership Award Winner:

MIKE MILLER CHIEF OPERATING OFFICER 407 EXPRESS TOLL ROUTE (ETR)



MIKE MILLER

A **SUCCESSFUL LEADER** is one who understands that the best performance goals are those that pull everyone in the same direction. At 407 Express Toll Route (ETR), COO Mike Miller sees first call resolution (FCR) as a perfect metric for driving performance—it is easy to use, helps to minimize the organization's cost to serve, and it drives high levels of customer satisfaction. And most importantly, it is one that involves everyone.

Miller has been driving FCR performance at 407 ETR's contact center for the past decade with notable results—a steady improvement of 2% each year and the achievement of World Class levels. To Miller, the metric is closely aligned with the center's vision. "Our customer experience vision is exactly what FCR represents, which is to enhance customer satisfaction while reducing operating costs," he says. "Although we started with a somewhat modest FCR statistic, we're now consistently over 80%. And every year, we see improvement—it pulsates along, getting higher every year."

At least twice a year, Miller and his team undergo a targeted FCR improvement process. First call resolution is measured for each customer segment, and then by call types within those groups. The team then identifies the performance gaps in different call types and develops practical tactics to improve the FCR. "We can then measure the closing of those gaps by reduced calls, lowered costs and increased customer satisfaction," he says.

This exercise has helped to uncover a few customer expectations that the team was able to address. One that generated a significant bump in FCR was related to speed of delivery for 407 ETR's transponders—the small electronic devices attached to a vehicle's windshield that automatically record and apply tolls to the customer's account. Some customers weren't getting their

transponders on time. After reviewing the FCR performance data, Miller and his team were able to put in place practices to speed up the process and ensure that customers received their transponders immediately.

Another sizable FCR improvement followed a website upgrade. "We recognized in the FCR statistics that our customers wanted to self-serve if they could," Miller says. "We revamped our website so that customers can conduct all of the tasks and services online that the CSRs provide over the phone."

Everyone at 407 ETR is accountable for FCR performance. "Each of our employees—not only in the call center, but in the back office and leadership—has a first call resolution goal in his or her bonus plan," Miller says. "We track individual and team FCR performance on a daily basis. It creates a great goal for our CSRs to strive for, and it really puts everybody's skin into the game so that they're all pulling in the same direction."

Miller sees FCR improvement as a companywide effort. "The team deserves this award, not me," he says. "There can't be a singular winner with respect to FCR. Almost by definition, everyone has to be involved, because if we're not all following that statistic and trying to close the gaps, we're not going to make any progress. We're all in this game together."

Like any other business, without customers there would be no 407 ETR. Miller believes that the daily monitoring of the Voice of the Customer by SQM is essential and helps 407 provide the superior customer experience that his customers deserve. He concludes by saying, "Our CSRs are totally focused on helping our customers find resolution, and the tools provided by SQM have become absolutely essential."



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FCR IMPROVEMENT AWARD

BlueCross BlueShield of South Carolina

FCR LEADERSHIP AWARD

Vicki Whichard, Assistant Vice President, Customer Experience

FINALIST FOR CSR OF THE YEAR

Pamela Cragin

WORLD CLASS CERTIFIED CUSTOMER SERVICE ADVOCATES

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Pamela Cragin
Krista Dodrell
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Lisa M. Edwards
Lashun Fowler

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FCR Leadership Award Winner:

VICKI WHICHARD

ASSISTANT VP, CUSTOMER EXPERIENCE

BLUECROSS BLUESHIELD OF SOUTH CAROLINA



VICKI WHICHARD

BLUECROSS BLUESHIELD OF SOUTH CAROLINA is one of the largest provider networks in the state and has been a trusted healthcare provider for seven decades. As part of an effort to optimize service delivery in an increasingly complex health care landscape, BlueCross leaders recently decided that it was time to revitalize a long-standing culture that had become somewhat set in its ways. The challenge: How to energize thousands of employees across functions to rally around customer-centric values?

Transforming a long-established culture is no simple task. It requires a leader who is willing to do the unexpected to get people's attention and to engage them so that they will embrace change.

Enter Vicki Whichard. As Assistant Vice President of Customer Experience, Whichard is responsible for driving a culture change at BlueCross that resulted in a 13% increase in first call resolution in one year. Drawing on her background in marketing and sales, Whichard developed a series of creative and compelling promotions to build awareness for FCR and its impact on the customer experience.

The first video—developed for shock value, she says—featured 48 BlueCross employees, including company executives, lip-syncing the lyrics to Carly Rae Jepsen's pop hit, "Call Me Maybe." The video logged a thousand views the first day that it was posted to the intranet site. "We wanted people to realize that we were serious about changing our culture," she says.

Whichard realized that, to improve FCR performance, she needed to build awareness across the organization. "Most BlueCross employees who are not in the call center were not familiar with FCR and why it's important," she recalls. "We created a brand for our customer experience efforts: CARE, an acronym for Customers Are Reason Enough. We use the color purple in our CARE logo because purple is associated with royalty, and that's how we want to treat our customers."

Whichard and her team then developed a CARE microsite on the company's intranet. The purpose of the site is both to inform and recognize. In addition to the customer experience strategic vision, the daily FCR score is published on the site, along with training tools, articles written by BlueCross coaches, feedback sections in which frontline staff can ask questions and share their thoughts. The site is also used to recognize outstanding customer service advocates (CSAs), including those who achieve World Class Call Certification.

A production firm was hired to help create an animated FCR mascot—Tony. "Tony is a BlueCross CSA with a 'rock star' alter ego," Whichard explains. Last year, Tony starred in three videos that focused on defining FCR, showing how everyone impacts FCR and recognizing CSAs for Customer Service Week (three

more videos are planned for 2014). "The call center embraced the mascot," she says. They held contests in which supervisors dressed as rock star Tony. Those activities carried over into Customer Service Week with themed events like "Dress Like a Rock Star" day and call center karaoke in the employee cafeteria. CSAs and visitors to the center during the week were provided with rock star and guitar-themed giveaways.

But, Whichard says, "the biggest hit of the week was the call listening stations." Customer experience rooms were set up near the employee cafeteria (a high-traffic area, she notes). Employees who visited the rooms were provided with free earbuds and popcorn while they viewed slides with call statistics and listened to actual member phone calls. More than 700 employees visited the rooms over three days. Whichard positioned herself just outside to get feedback from employees as they exited the rooms. "Most non-customer service staff left with a new appreciation for the CSAs," she says. "They didn't realize how demanding the role could be, and how their job impacts it."

In addition to building awareness for FCR and the customer experience, Whichard focused on empowering employees with targeted coaching sessions, which were tracked for the impact on FCR scores. "More coaching equaled higher scores," she points out. CSA feedback about the coaching was very positive—even among call center veterans. "They felt that they were provided with new skill sets that they could apply on the job," she says. In fact, after rolling out the coaching program, "we saw a huge jump in our FCR and our CSA satisfaction."

The centers also ramped up their feedback and data collection, and tied staff incentives to FCR and customer satisfaction scores. Managers and supervisors used voice analytics tools to identify opportunities for improvement, and to monitor for unresolved issues on a real-time basis.

Finally, an FCR Improvement Tactical Team was assembled with representatives from each of BlueCross' various call centers. Each Monday, they meet to discuss customer feedback trending topics, and strategies for engaging customers in positive way, Whichard says, adding that: "This group has driven improvements such as service level agreements between dependent departments, increased transparency of information, and consistency in our quality control processes."

Whichard's holistic approach for driving a customer-centric culture change has been remarkably successful—not just within the call centers, but throughout the BlueCross organization. But, she is quick to point out, "It's not a one-person effort—it takes everybody working together."

FCR Champion Award Winner:

CHERYL CASE SENIOR DIRECTOR, CONSUMER AND GOVERNMENT SERVICES FLORIDA BLUE



CHERYL CASE

CHERYL CASE believes that, for employees to thrive in a performance-driven culture, they need both the skills and the will to continuously improve. Two years ago, when Florida Blue decided to adopt first call resolution (FCR) as a performance measure, Cheryl Case was tasked with leading the initiative to achieve World Class Call Certification. At that time, initial surveys marked the contact center's FCR around 58%.

Case was faced with a significant task, but one at which she was determined that she and her staff would succeed. She quickly assembled a team to help her execute the plan, and they began with a full assessment of the contact center's current state. The team identified several improvement opportunities, which were sorted into people, process and technology issues.

To tackle the people issues, the team grouped the employees into three performance categories: high, middle and low. Within the low-performing group, it became very clear that there were two critical obstacles preventing them from performing at a higher level: "We had some people who had skill issues, and others who had will issues," Case recalls. She met with the group to gauge their commitment to providing customer care, and to get their feedback about whether it was a role that they wanted to remain in. In a very frank discussion, Case explained that their current level of performance was not where it needed to be to support the organization's vision for delivering best-in-class customer service. The choice was theirs. "I told them that, if they had an interest in turning that around, I had an interest in investing in them," she says.

That investment included a course of intensive coaching on call strategy. FCR Operations Manager Diana Anderson set up a core lab designed to be a safe learning environment. The center's top coaches were assigned to the lab, which had a 5:1 support ratio.

The approach was successful—those who had the will to perform became highly enthusiastic participants. "We started to see the engagement," Case says. "We reenergized our employees around their reason for being, which is the customer. People were excited about listening to their calls. They conducted role-play sessions with each other, and they were passionate about serving the customer."

Case also turned an eye toward the leadership team. At leadership meetings, she stressed to the management team, "if we expect to have world class employees, then we must have world class leaders. We will teach you how to be a world class leader." She turned to Anderson to help set up another safe learning environment for the leaders. Called the Learning Lab, it focused on learning and applying the coaching process, and showed supervisors how to identify gaps in performance, how to coach to resolution, and how to identify and coach different personality types. "We required every one of our frontline leaders who had direct reports to go through the Learning Lab, which was a 20-hour investment," Case says.

In addition to improving leaders' coaching skills, the lab impressed on customer service staff the fact that everyone was accountable for improving performance, not just the front line. "We're not just asking our CSRs to improve, we're expecting the same of ourselves," Case says.

While Florida Blue achieved significant increases in FCR improvement since the initiative began, Case points out that it is a journey. "Each day, we're learning more about the customer," she says. "As leaders, it is our job to ensure that we have the right processes for our staff and for our customers so that the service interaction is exactly what people expect and deserve—a world class experience."

FCR Champion Award Winner:

BERNADETTE VICTORELLI **DIRECTOR, SENIOR MARKETS** **HIGHMARK BLUE CROSS BLUE SHIELD**



**BERNADETTE
VICTORELLI**

BEING CUSTOMER-FOCUSED is not a new concept at Highmark Blue Cross Blue Shield. The healthcare provider has long had a culture that places the customer at the center of everything that they do. “Care is a fundamental part of our vision—care for our members and for our communities,” says Bernadette Victorelli, Director of Highmark’s Senior Markets.

So how do you improve on an already strong vision? “By always keeping our customers top of mind,” she stresses. For Victorelli, driving high performance on first call resolution (FCR) has helped the contact center to understand the critical drivers that contribute to both positive and negative outcomes. Focusing on FCR also keeps the improvement focus on the customers. “It plays an important role,” she adds. “It allows us to not only provide a world class service experience, but in those instances where a call may not have resulted the way that we would like, we have the opportunity to improve it. The ability to combine customer survey data and comments with feedback from frontline staff, is vitally important to our organization.”

Last year, Victorelli put together a team to focus specifically on FCR improvement. “The goal is to hold everyone accountable for FCR,” she says. “Whether they answer the call, process a claim, send out literature, handle their complaints or others, they all have accountability for ensuring that member’s call is handled correctly, and completely, with one call.”

Every call is considered an opportunity to learn. The team listens to each call that wasn’t resolved on the first contact and calibrates those with the management team and the CSR. Importantly, CSRs are active participants in their performance improvement. “CSRs have an opportunity to listen for themselves, and then discuss with their supervisor or manager how they could have handled the call better,” Victorelli explains. In many cases, though, the call was handled perfectly, yet she points out that “we can learn from the positive interactions, as well. There is an opportunity to continue that positive behavior.”

Each CSR receives a minimum of seven Voice of the Customer surveys per month, and has weekly coaching sessions with his or her supervisor. CSRs who have achieved 100% on their quality scores or have achieved World Class Certification also act as coaches and mentors for their peers.

The high level of transparency and collaboration that exists between Highmark’s frontline staff and management is another critical component of the organization’s culture—and it is stressed early in the interview process with potential contact center candidates. “People clearly understand what their roles and responsibilities are before they begin their employment,” she says. “And then on a daily basis, we have very compelling mission, vision and value statements that are impressed upon our staff, our management and our leadership.”

In fact, at Highmark, FCR improvement is not viewed simply as a contact center goal. In addition to improving contact center processes and CSR performance, over the past year, Victorelli reached out to other key touchpoints on the customer journey to share FCR and customer survey results with the rest of the management team. “The calibration process helped us to identify issues and tasks that might be out of the CSRs’ hands, so we need to get other areas involved to do whatever is necessary to ensure that our CSRs can resolve customer issues swiftly, efficiently and effectively,” she says.

Victorelli and her team are committed to innovation and excellence (which are also Highmark values), and believe that the ability to track and trend FCR performance and VOC data offers them a great opportunity delve into the details of the day-to-day workflow. “It’s very important to our model of continuously focusing on those things that we can improve upon—and it is ingrained in everything we do,” she says, adding that winning the FCR Champion Award is a “compliment to our entire team that has been working so hard on this very important initiative.”



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

CREATIVE THINKING SAVED THE DAY FOR A CUSTOMER

"Aidan ran with the idea and executed it perfectly."

Sometimes a little creative thinking can help make a difference and leave a positive, lasting impression. Such was the case last May when Aidan Lyall, a CRCC representative, saved the day for a customer who had run into a problem we have probably all faced once or twice. The customer had rushed to attend a meeting in downtown Toronto and parked his car in one of the many downtown lots. Hours later, he went back to collect the car and realized he could not remember where he had parked.

The customer called CTFS and Aidan, who had only been on the job a few weeks, took the call. The customer asked if there was a way to tell where his credit card had been used that day. Aidan ran with the idea and executed it perfectly. She searched through the customer's transactions and retrieved the postal code for the most recent one. She then used this information to find the location of the parking lot using Google tools. Once that was established, Aidan asked the customer for his current location and gave him walking directions back to his car. Needless to say the customer was extremely thankful, which is reflected in the customer's comments.

The customer called back just to say thank you for the help Aidan offered today. He was so happy that Aidan was able to tell him where he had parked his car so he was able to find it. He had lots of good things to say about Aidan and all the great help she provided, and felt it was necessary to call back. As he said, "People only call back to complain, but rarely call back to say thank you. I wanted to make sure Aidan was thanked again for the service she provided me this morning. Great job!"

—Aidan Lyall, Canadian Tire Financial Services

CUSTOMER TREATED LIKE FAMILY

"The steps Jo-Ann took next set her apart as a World Class representative, particularly as the call moved from a very typical situation toward one that required quick thinking, compassion and extreme service."

It was late on an August evening when Jo-Ann (an experienced representative in our Roadside Assistance division) received a call from a young, new driver. The customer was visiting Toronto and was involved in a minor accident on a ramp of the QEW (one of Ontario's busiest highway that sees approximately 200,000 cars per day on some sections). The customer was very nervous and upset. Jo-Ann displayed great composure as she asked the customer important questions to help determine what happened and exactly where she was located. The steps Jo-Ann took next set her apart as a World Class representative, particularly as the call moved from a very typical situation toward one that required quick thinking, compassion and extreme service. First, noticing the customer was young in age, Jo-Ann offered to get in contact with the customer's parents. The quick thinking teen, however, had already spoken to her parents who advised her to contact Canadian Tire Roadside Assistance, because she had coverage with our plan. While on the call, a non-contracted tow truck driver arrived and started to hook up her car. This created additional anxiety for our customer, as this tow truck driver expected cash payment and she did not have enough money to cover the expense. Jo-Ann provided excellent guidance and direction to the customer, helping her to maintain control of the situation, and coached her on what to say to the tow truck driver. Meanwhile, Jo-Ann followed up directly with our contracted tow truck driver to have the vehicle towed off the ramp safely and cover the long-distance tow charge. She then made arrangements for the customer to receive a ride home and followed up with her later to make

sure everything was OK. The next day, the customer's mother called to commend Jo-Ann for her amazing service. She was genuinely appreciative for the level of compassion Jo-Ann demonstrated, saying that she treated her daughter like her own family.

—**Jo-Ann Topolinsky**,
Canadian Tire Financial
Services

CONFERRING A MEMBER'S CALL TO OBTAIN FIRST CALL RESOLUTION

"Joslyn decided not to transfer him, and instead decided to conference the call to obtain First Call Resolution."

Building a great rapport with our members is one of our top priorities. Joslyn received a call from a member who wanted to gain a better understanding of his healthcare product and services that were rendered. In the beginning of the call, the member expressed his confusion about how his medical and prescription claims were processed. However, with Joslyn's pleasant tone and thorough explanation, the member was able to comprehend how the claims were processed. Joslyn gave the member all of the requested information and the amount that went toward his deductible.

Joslyn's excellent customer service did not stop there; after giving the member a detailed explanation of his medical plan, the member had additional questions concerning his prescription product and wanted an explanation on how his prescription claims were processed. Although Joslyn does not handle prescription calls and is limited to the specific prescription data, Joslyn decided not to transfer his call

and decided to conference the call to obtain First Call Resolution. Joslyn was able to speak with our Pharmacy Vendor and gave them a brief overview of the issue/concern which allowed the member not to repeat himself.

Joslyn stayed on the line with the member and our Pharmacy Vendor until the member confirmed his understanding of how the prescription claims were processed. A deductible audit was performed and mailed out to the member. Joslyn followed up with the member to ensure that all requests, needs and issues were resolved/addressed. The member stated how grateful he was to have experienced great customer service by Joslyn.

—**Joslyn Knight Cherry**,
CareFirst

EFFORTS REWARDED BY GAINING A NEW CUSTOMER

"This caller did not have any previous dealings with our company in the past, and I could tell she wanted more personal service. This was an opportunity to make a lasting impression."

I originally took this job at the call center to help people. As time went on, I felt I was just going through the motions. Most calls seemed so alike to me. My customer feedback was middle of the road. Last year, my organization modified our Quality program, shifting an increased focus on the end to end customer experience. When I participated in workshops to put the message into action, I was shaken out of my daze. I now understood that every level of my organization from my company president all the way down to my supervisor said that making customers happy is what our organization should be about. By focusing

on each customer and not just what I had to do for my job, I felt invigorated. I was SQM certified with World Class Calls for the first time in my life. Each call was different because each client was different. Each interaction with a customer was an opportunity for me to shine.

One such chance came while I was working the late shift. The caller was a potential customer interested in purchasing personal health insurance. Our process is to direct the caller to a licensed advisor, who will call them back in a few business days. If the caller wanted to speak with an advisor right away, I could transfer to a financial center. Unfortunately, because it was so late at night, the financial centers in the client's area were closed. There is also the option to purchase personal health insurance online. If the caller does not want to speak with an advisor, our normal process is to direct the caller to our website and leave it up to them. This caller did not have any previous dealings with our company in the past, and I could tell she wanted more personal service. This was an opportunity to make a lasting impression.

Using effective probing, I found out that she wanted insurance for herself and for her daughter right away. She was not sure how to navigate our website, so I opened up a browser window and walked her through step by step. She then had questions about certain plans that normally would be answered by our personal health department. Unfortunately that department was closed. I felt it was my duty to try and help this potential client as much as I could, so I diligently tried

to research the answers to her questions. The caller was concerned about security and did not want to provide her credit card information online. I knew this was a make-or-break moment for whether she would choose our company for health insurance. Although this was not a part of the website that I am overly familiar with, I quickly located other payment option details for the client. I provided her with the location of a PDF form so she could fax us her banking information to have the payments taken directly from her bank account. The client was happy that she did not need to provide us with her banking information online. I let the client know that she could buy the insurance online and follow up with the personal health insurance tomorrow to find out how quickly her policy would be in effect.

The caller was so thankful that I was able to assist her with this urgent request. I was so happy to see that my efforts were rewarded by this client choosing to do business with Sun Life. I felt I had gone above and beyond to deliver superior customer service to this potential client. I work in the life insurance area and I often get calls from customers needing assistance with products that I do not handle. If something is not my area of expertise, I am confident that no matter where I direct the customer, the next employee has the same mandate to put the needs of the customer first. It is really empowering to know I am really helping people and my company is behind me all the way. That is why I am proud to represent Sun Life Financial.

—**Lynn Desouza**, Sun Life
Financial

GOING THE EXTRA MILE FOR A CUSTOMER IN NEED

"Normally this process could take a month, but through perseverance Max was able to get the approval within a few hours."

Max received a call from a nurse case manager who was reviewing a prior approval request for a customer's knee surgery. The surgery had been scheduled for eight months, but the customer was new to her insurance plan so the prior approval needed to be completed in an expedited fashion. Unfortunately, the member had a waiting period for pre-existing conditions on her policy that happened to be the only thing that hindered her surgery from being approved. A waiting period like this was

only applied to a customer when they did not have any previous coverage, but the customer stated she had been on another carrier's policy for over a year but had not realized she needed to let the insurance company know. The solution was simple: obtain proof of previous insurance from her old carrier. The problem? The process to get such proof can take weeks; the surgery was scheduled for Monday, and it was Thursday morning.

Understanding the gravity of the situation, Max sprung to action. With the member on the line he obtained the phone number for her previous insurance carrier and made a conference call to obtain the proof of coverage. After the

other insurance representative verified the customer's information, he informed them that her policy was still active. The member had not paid her premiums and assumed the policy would be automatically cancelled but the carrier needed to be informed before the policy was officially terminated. The representative said he could take the cancellation over the phone, but it would take up to two weeks to process and then another week to generate a proof of cancellation. Max did not want to give up so, pressing the matter, he asked if there was anything else that the representative could do. The representative informed Max that this member's policy was a COBRA policy and that

his company was a third-party administrator for the insurance carrier that had held the original policy through the customer's previous employer. He informed them that the original carrier would be the only one that could generate a proof of coverage. Even though they had already been on the phone for over 45 minutes, Max did not want to give up. Asking the representative to connect them to the original carrier, he made another conference call to ensure that this proof of coverage could be obtained.

When Max and the customer finally reached someone that could assist them, the new representative told them the only thing he could do was mail the proof of coverage and

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Florida Blue would like to commend Cheryl Case as the winner of the 2013 FCR Champion Award. Congratulations to Cheryl and the entire Florida Blue Service team for their commitment and dedication to our members.

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the customer would receive it in two weeks, or fax the proof of coverage directly to the customer. The customer did not have a fax but she did know someone who did. The three formed a plan: the representative would fax the proof of coverage to the member, the member would forward it to Max's attention, and Max would then make sure it was reviewed to remove the waiting period from the member's policy.

After almost two hours on the phone, Max disconnected the call and waited for the fax. After two hours and constantly checking, the fax finally arrived. It was exactly what they needed. He quickly scanned the document and

contacted the department that could remove the waiting period. After everything was finalized, he called the nurse case manager who was able to approve the authorization so the member could have her surgery. Normally this process could take a month, but through perseverance, Max was able to get the approval within a few hours. The customer was able to have her surgery that Monday without any further issue.

—Max Tardie, BlueCross BlueShield of Vermont

THE MEMBER NEEDED MORE THAN A HAND—HE NEEDED A FRIEND

"I did not know him and that was my first time talking to him, but I knew I had to be strong for him."

As a Customer Service Advocate, I try to go above and beyond on all my calls, but there one call in particular that stands out from all others. In late summer 2013, I received a call that was life-changing. I usually take my calls personally and extend every helping hand possible. But it was clear to me that this caller needed more than a hand—he needed a friend. For his privacy, we will call him Mr. Doe.

Mr. Doe was an elderly man in his 70s who maintained employee/spouse coverage with BlueCross BlueShield Small Group and his coverage included Medical, Life and Dependent Coverage. He was calm and quiet as we discussed hospital claims and

his responsibility for the claims. As I began doing my research, I noticed the claims in question were not for him, but rather, for his wife. I explained to Mr. Doe that we did not have authorization on file and I would not be able to assist him, but I gave him options so that he could get the assistance that he needed. I said that if I could speak with his wife for verbal consent, then I could assist him. This man became extremely quiet at this point. It did not cross my mind that anything was wrong. After a 30-40 second pause, he said his wife died from cancer. My heart melted. I did not know him and that was my first time talking to him, but I knew I had to be strong for him. I gave

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AWARDS, OUR
PEOPLE DO**



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him a few minutes to gather his thoughts. He went on, saying they married young and that she was his friend, his love, his life, and he missed her. Of course, at this time, my eyes became very teary, but I stayed focused. He then said that he had stayed by his wife's side during her illness. She had terminal cancer and he took full responsibility by staying home to care for the love of his life. He seemed tired and lost, as if he did not know where to start. He was unable to retain the information I was giving him. It was almost as if he was still appalled or numb from losing someone so dear.

My eyes were tearing more and more as he poured his heart out, but I managed to hold it together during the call. I knew there had to be other options for such a delicate case, and as he explained how he used money set aside to pay property taxes for his wife's medical bills, I was trying to think of other options. He said he was counting on his wife's life insurance policy to pay for the property taxes and funeral. I was concerned and afraid that he may not be eligible for the medical or life benefits which he desperately needed. There were many roadblocks. From no HIPPA on file, to the hospital, funeral home and others pushing for payments, I can only imagine how distraught he must have been. I know how it feels to care for an ill loved one. To be fully responsible for another life and take care of your personal business as well can be a struggle. I was determined to ensure that he received the assistance he needed.

Through gentle, leading questions, I was able to determine that he worked for a company for many years and

had accumulated leave and sick pay, which likely covered most of the time he took off to care for his wife. I called the company to confirm the accumulated leave time and advised the company to reference this in the event there were any questions about him being actively at work and his eligibility for benefits. I also advised them that they should explain he was using leave accumulated over the years. With his approval, I was able to conference call one of his daughters and receive an email address so I could forward the life claim form to him with instructions on next steps. His daughter confirmed that she would help her father with this process. I told him that we would need legal documents to show he was his wife's personal representative so we could share the medical claims information with him. I explained to his daughter that we could answer yes or no regarding EOBs, if they had one in their possession. I continued to follow up with one to two calls per week for the next three to four weeks. I offered my support by checking on the status of the completed documents and nudging him (or his daughter) to follow through so he could receive the life insurance claim benefits and get the medical bill resolved. I also called Companion Life for additional information regarding the filed life claim and to assist if possible. Knowing his state of mind, I was not comfortable with his ability to complete documents accurately. He was relieved to hear my voice on each and every call and it gave him time to share more about his loss. He seemed to need that and it genuinely seemed to comfort him. I did not need to have the constant

communication with him after this call was completed, but I care for my callers and I understood that this was not just a caller, but a person with great loss who needed some additional assistance. I showed him that BlueCross BlueShield of South Carolina cares about their members, not just as a number, but as a person.

NOTE FROM PAM'S MANAGER: Pam was truly touched by this member and she has, in turn, taught her team to take time with their customers. She has taught them to look at each person who calls in as a person and not just an ID card number, and also to not be afraid to go that extra mile and offer additional assistance that may not be in the regular line of duty. The relationship Pam had with this caller will no doubt affect the customer's relationship with BlueCross BlueShield of South Carolina. The next time he goes to select health insurance, he will remember how much Pam cared about him in his time of need and how she went the extra mile just to ensure that he was OK. Pam is truly what a great Customer Service Advocate should be.

—**Pamela Cragin**, BlueCross BlueShield of South Carolina

TAKING OWNERSHIP OF THE SITUATION TO GET RESOLUTION

"Rachael immediately reassured the customer that she would do everything in her power."

Rachael displays World Class Customer Service with each and every call she takes. She consistently demonstrates an ability to prioritize and own an issue until she determines what is truly impacting her customer. In the first week of December, Rachael received a telephone call from a frantic customer.

This customer was very apprehensive as she had injured herself while on vacation and did not qualify for employer-paid benefits, such as short-term disability. She was going to take a chance and apply for government benefits. To receive these benefits, your employer must provide the government with the necessary paperwork, describing your past 12 months of income earnings. Due to the circumstances behind the request for the required paperwork, our payroll department was unable to immediately release this paperwork to the government, causing delays for our customer. The customer was understandably upset; she had injured herself at the beginning of the most stressful 31 days of any year, December. She was also worried about the delay in the government receiving her paperwork. Rachael immediately reassured the customer, that she would do everything in her power to ensure that the paperwork would be released as soon as possible.

Rachael investigated the cause of the delay and discovered that we had not received the request to do so from the customer's office. The customer stressed that she confirmed it was sent three times prior to speaking with Rachael. Rachael advised the customer that she would check her file throughout the day and update her as soon as the necessary paperwork was received. Her intent was to expedite the process once it was received, but the documents were not received that day, or the next. Rachael, knowing that there must be an additional reason the information had not arrived, and concerned for the customer's situation, took ownership of the issue and

reached out to her Resolution Specialist. She also sent an email to her Resolution Specialist's office to discuss the situation and possible options. Rachael convinced her Resolution Specialist to contact the customer's office directly to find out where the paperwork was sent. Their inquiry determined that the paperwork had been sent for approvals, and not for processing, due to the type of leave. Rachael and her Resolution Specialist were able to speak with the approver of the paperwork and received confirmation that it had been submitted for processing. Rachael was able to contact the customer and assure her that the issue was definitely being addressed and that the necessary paperwork was being created and processed. This reassured the customer and demonstrated that her issue was important.

Rachael made sure the customer was updated throughout the process and made numerous phone calls to her during this four-day period. Rachael has a remarkable ability to empathize with customers. She is the first person to put herself into another's shoes and show them she truly understands. She understands that she is helping people like herself, with families and everyday problems and concerns; and she treats them the way she would like to be treated.

—Rachael Clarke, TELUS Sourcing Solutions Inc.

ONLY ONE CALL NEEDED BY MEMBER TO OBTAIN URGENT RESOLUTION

"I was committed to getting this taken care of before not only the holiday, but also before everyone left for the day."

When asked to write a member experience story for 2013, it was hard to pinpoint just one, as taking the member out of the middle and ensuring first call resolution, has become so ingrained in our call center; it is simply the way we do business. Thinking outside of the box and going above and beyond is just what we do. For example, it was the day before Christmas break and close to our close of business; most companies had already closed down for the holidays when I received a call from a frantic mom. She was understandably very upset; her son was sick and needed medication. She had gone to the pharmacy to obtain his medication and was told that she did not have coverage and would need to pay out of pocket for her son's medication. This medication was very expensive and she could not afford the cost. She called our call center looking for assistance and resolution. I reviewed her membership and confirmed that her son had not yet been added to her group policy. I reassured her that I understood the urgency of the situation and told her not to worry; I was committed to getting this taken care of before not only the holiday, but also before everyone left for the day.

Five minutes prior to closing, I reached out to another department and asked them to expedite the load of this membership into our medical and pharmacy systems. This was completed in just a few minutes for this member. After getting the membership loaded into our systems, I called the pharmacy and had them process the member's prescriptions to their benefits. I then called the member back and let her know that her prescriptions

were all set to be picked up at the pharmacy. The member was extremely thankful that I had taken ownership of her issue and worked so quickly to have it resolved. She was able to pick up her son's medication that day and she only had to make one call, something I feel very proud of.

—Sarah Pollard, BlueCross BlueShield of Vermont

QUICK THINKING TO REUNITE MEMBER WITH HIS WALLET

"Thanks to Susan's quick thinking we were able to help save our coworker from a lot of anxiety and frustration."

As a CSR at VSP Vision Care we talk to members, doctors and clients. Occasionally we get calls from members asking about dental coverage and sometimes we get calls about package delivery when they mistakenly think we are UPS. When a non-member called us, CSR Susan Elkins was not thrown off. The gentleman on the phone explained he had found a wallet on a hiking trail in Colorado belonging to one of our members. He went on to explain that the wallet held sensitive information such as a social security card. Susan felt she wanted to help locate this member and get him reunited with his wallet. She asked the caller if he would mind holding while she did some research. He said it was not a problem because he really would like to see the wallet returned. Susan contacted the member's employer. She explained the situation. The employer was concerned about giving out the member's address. The employer offered to contact the member and connect the member with the gentleman who found the wallet. Susan returned to her caller and asked

if he would provide his phone number. He did. She told him that they were in the process of contacting the member and to expect a phone call. She thanked the gentleman for his good deed.

This member was a nurse vacationing in Colorado. When his employer contacted him he did not realize that he had even lost his wallet. He was so thankful for the Good Samaritan because he would have had great trouble returning home to Missouri without it. He was very lucky that the gentleman who found the wallet was smart enough to contact Susan at VSP who went way above her call handling requirements to get this member's wallet returned.

The employer sent this compliment to Susan: "I just wanted to give a shout out to Susan Elkins in your service department. Susan received a call from a stranger in Colorado who found the wallet of one of our employees vacationing in Colorado. The wallet had everything, including social security card in it. This gentleman is the first hero in this story! Susan kept the caller on the line while she called me to validate our employee's information. She is the second hero! While I searched for a way to contact our coworker, Susan got back on the line to let this Good Samaritan know we were working on a solution. We were able to get in touch with our coworker. They both made contact and the wallet was safely returned. Thanks to Susan's quick thinking, we were able to help save our coworker from a lot of anxiety and frustration. This is a perfect example of VSP going above and beyond the required service level. Just another reason why we love VSP!"

—Susan Elkins, VSP Vision Care

RECOGNIZING AN OPPORTUNITY TO MAKE ALL THE DIFFERENCE FOR THE CUSTOMER

"I realized that I could turn what could have been a call I would want to forget into one that would help me define myself as a representative who is truly focused on customer care."

Sometimes in customer service it can feel a little easy to forget the impact we can have on the lives of our callers. In our day-to-day quest to resolve their concerns, we must always stop to remind ourselves of the influence we have and what can sometimes be the lifeline role we hold for our customers. Early in my Sun Life career, I was presented with that moment of truth where I realized that I could turn what could have been a call I would want to forget into one that would help me define myself as a representative who is truly focused on customer care.

The call came from a plan member whose plan had terminated recently. He had been to the pharmacy to pick up a prescription that ended up not being covered. Assuming we had made an error, he called the CCC very angry and more upset than one would initially expect for the situation. In fact, he was so angry at the outset that he threw down his phone and just could not talk about it. I sensed there had to be more to this story. I hoped he would return to the line and so I waited patiently. Luckily, his wife returned to the line and apologized for her husband. Their stress was palpable. Through empathy and reassurance, the story began to unfold and I came to understand. I also recognized

my opportunity to relieve their stress.

The story was not an uncommon one. The company our client was working for had forced him into early retirement and he and his wife were left emotionally and financially unprepared for the challenges this upheaval would bring. They were under the impression they had a little more coverage time on their plan and were shocked when I told them that the plan had indeed been terminated. The husband being unable to talk, the conversation continued with our client's wife. In probing for understanding and seeking possible solutions, I asked her if she had any coverage of her own. She did not think she did, but, low and behold, I found an active plan under her name. They had never thought to see if her plan was still active because her husband's plan had always covered everything for them. The olive branch was found. Now the relief was palpable.

It did not end there. Upon reviewing their newfound coverage, we were nearing the end of our conversation when she mentioned they were hoping to figure things out on an upcoming trip to Cuba. We went through the travel insurance under her plan and I informed her she would need proof of coverage to enter Cuba. She did not have access to a computer with which she could print the card, so I asked her when they were leaving, to see if I would have enough time to mail a card to them. As it turns out, they were leaving the very next day. Well, I did not give up. I asked her if there was anyone she could visit that day with a computer who could print the card with her. Fearful, she said her daughter

was already at work and she would not be able to get to her house before their departure the next day. I asked her for her daughter's phone number and together with her on the line we called her daughter to explain the situation. Unfortunately, her daughter was out for lunch and unable to access a computer. The barriers seemed to keep coming. My determination was steadfast. I was not letting this go until they were helped; pure and simple. I asked for her daughter's fax number and told them that I would fax over the medipass during my lunch hour and that I would then call her back to make sure that she had received it. Finally, a resolution.

Although we are an inbound call center, after I faxed the medipass, I felt it was necessary to call the couple back to make sure everything had been received. The wife answered and while talking to her, her husband actually came back on the phone and apologized for his earlier behavior. He broke down explaining how hard the early retirement was on them. He had always been the provider for the family and now he felt helpless and insecure about their future. Now I knew there was even more we could do. I explained to him the guidance our Advisors can provide and asked if he'd like to be contacted by one of our Sun Life Advisors after their trip. He took me up on the offer immediately, with gratitude and happiness in his voice. Lost with this new life change, they finally felt that knowledgeable help was on the way and they were not alone to find their way. I was very grateful that I was given this chance to be of service and make such a difference.

When the conversation was over, I was exhausted. So much had happened, but I was very relieved that I could help them, and I was proud of myself for my caring, perseverance and outside-of-the-box thinking. From the very start and all the way through our initial discussion, this call could have taken a very different path with unfortunate results.

As a CCR, it can sometimes be challenging to not react to those negative emotions that land on us with our first hello. We just have to remember that everyone calling us has a story, and that we do not know what has led them to this level of distress and to this phone call. We do not always get to know the story, but making the extra effort to find it out will always give us the opportunity, if we seize it, to be that person who made all the difference. I remember that call vividly and proudly, and strive every day to be the person that my callers will fondly recall the next time they think about Sun Life Financial. It is a privilege and great responsibility to have such an opportunity to touch so many lives daily.

—Tara Gray, Sun Life Financial

WORKING TOGETHER TO GET TO THE ROOT OF THE PROBLEM

"I had to do something. The family was stranded at a gas station a long way from home with no available credit."

One evening a call was transferred to me through the security queue from another CSR because of a security block on the account. The callers were frantic—they were travelling home to Ontario from a Florida vacation and neither of the credit cards on their account was working. They, along with

their young children, were relying on their credit cards to pay for accommodations, food and fuel on the way home. They were considerably worried about their ability to pay for the trip home without the use of their cards. After listening to the situation, it was easy to empathize with them. I assured the customers that I was here to help and that we would work together to get to the root of the problem.

Upon viewing the account, I could see that in addition to the security flag that caused their account to be blocked, all of their available credit was used and the account would actually be over its limit once several new pending

transactions were also posted. I followed our processes by first reviewing the transactions the system had flagged with its security block. I was quickly able to determine that the primary card holder's card had been counterfeited and used in another state. Unfortunately, even though our system had caught the fraudulent activity and blocked the account, the fraudulent transactions that had been processed exhausted all of their available credit. The transactions were all on the primary cardholder's card so I was able to cancel that card and reissue, which also allowed me to remove the security block from the account. The second card on the account

was then reactivated, but I knew the family would still have no available credit on their account until the fraudulent transactions were removed from the account, which can take some time.

I had to do something. The family was stranded at a gas station a long way from home, with no available credit to pay for their gas, food for their children, or accommodations for the night. My next step was to look for any credit limit increase offers that the account might qualify for. Luckily, there was one available so I explained the offer and by processing the limit increase, it gave them the funds needed to hold them over until the fraudulent

transactions were removed. The couple was understandably frightened and upset when they realized that their card had been compromised, but I was able to put them at ease by explaining that the situation was certainly not their fault and that they would not be held responsible for the fraudulent transactions. By the end of the call, they were no longer stranded, the fraud investigation was well in progress, and they definitely had an interesting story to tell friends and family about their vacation.

—Wendy Cleversey,
Millennium1 Solutions

CONTACT CENTER PIPELINE CONGRATULATES THE SQM AWARD WINNERS AND FINALISTS

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

A GREAT LEADER—SHOWING CSRS HOW TO TRULY ENJOY THEIR JOBS

"It is clear that he values every single team member."

Marc is the Best! Last year was our first full year with the Voice of the Customer program in the Individual call center. At the call center, we provide excellent customer service to both our clients and advisors. I can assure you that Marc, my team leader, has a very strong work ethic and coaches his team to be the best at what we do.

Last year, our team focused on placing quality in every single customer interaction. Marc was really excited about the opportunity to improve the way my team spoke with clients. He spoke with us as a group about how important it is to genuinely care about who we were speaking to, and that we had a responsibility to each of our clients to give them the help they need. This really resonated with me. I thought of the times that I had been frustrated with processes in my company or with client's expectations. Marc stepped up to be our go-to person for any client who we felt was not getting the service they needed. There have been dozens of times that Marc has followed up on cases, to check with different departments, to make sure cases are resolved and that customers are happy. He has really made the customer experience better and has shown by example how to truly listen to clients and empathize.

Even though it seems to come naturally to Marc to be this caring individual, he works really hard with each of us to drive us to succeed. Whenever a team member is struggling, Marc gives examples of good calls, role plays and listens to calls to find the issues. He showed me how to set short- and long-term goals. He celebrated with me when I achieved those goals, and encouraged me with goals I did not meet. Marc helped me to understand that the key to being successful at my job and, in fact, in life, is balance. Marc has shown me how to truly enjoy my job.

Through the years, Marc has received numerous awards for being the best team lead, and I now clearly understand why. In early 2013, I was sick and needed to go on short-term disability. Marc checked back with me while I was away and let me know what was going on at work. He made it clear to me that I was a part of a team and I would be welcome back as soon as I was ready. His words of encouragement during my time of need made a big difference. It is clear that he values every single team member. Most of my team works from home. Marc has the challenging job of managing all of us offsite. He has a knack for making us feel connected with him, our teammates and with upper management. All my teammates agree that Marc has done an outstanding job of being an inspiring leader. We believe that Marc lives up to the true definition of Supervisor of the Year and deserves to be recognized for his commitment to customer satisfaction.

—Marc Albert, Sun Life Financial

LEADING BY EXAMPLE—A CLEAR UNDERSTANDING OF EXPECTATIONS AND A WILLINGNESS TO MEET THE FCR GOAL

"I'm proud of the example that Karen sets for her staff of placing the members and their needs first."

Karen Lyons is someone who truly believes in "leading by example." During her eight years of management in Senior Markets, she not only expects a lot from her staff, but also demands a lot of herself in service to her staff. During my conversations with Karen on her team's success with FCR, I truly see the skill of leading by example. "If I want my team to have a clear understanding and to believe in FCR, I must demonstrate my willingness to meet FCR by being positive in my communication with the team, both during one-on-one discussions and during group team meetings. I must ensure that they all have a clear understanding and expectation of what it

takes to achieve FCR on each and every call.” Along with coaching calls that do not meet FCR guidelines, Karen states it is important to also share the positive comments shared by members on World Class Calls, as well as the success of the team in meeting the FCR goal. Karen is an active participant in call calibrations of non-FCR calls. She continually provides constructive criticism, and is very quick to recommend and help to develop tools that will assist the staff in developing their FCR skills.

I recently had the pleasure of witnessing Karen’s commitment to a member during an escalated Supervisor call. This member had not received resolution to her initial call, and Karen was quick to identify the issue and involve other units within Senior Markets to provide the resolution that the member needed and deserved. Although this situation was very difficult and the resolution was not an easy fix, Karen was diligent in making hard decisions and to hold, not only herself to the task of resolution, but also management from other units. Karen made multiple calls to the member, keeping her fully updated on the steps she was taking and how these steps were going to bring a resolution. I’m proud of the example that Karen sets for her staff of placing the members and their needs first. For these reasons, I’m proud to nominate Karen Lyons for Supervisor of the Year.

—Karen Lyons, Highmark

**A NATURAL MOTIVATOR—
EXPANDING INDIVIDUAL SKILL
SETS AND HELPING TEAM
MEMBERS TAKE OWNERSHIP OF
THEIR PERSONAL CONTRIBUTIONS**

“She offered regular feedback, allowing them room to make

mistakes so they could learn from them, and scheduled coaching time to build their confidence and skills.”

Wendy Chevette, a Supervisor in our Roadside Assistance division, enables success in her team through various ways. She provides an amazing amount of support to her team’s trainer/coach to set the trainer up for success, not just so the individual can benefit from the learning, but to ensure that the whole team does. She is a natural motivator, always trying to find ways to offer recognition or commendation. She is very perceptive and skilled at drawing out the individual talents and strengths on her team.

An example that stands out was when her team was encouraged to focus on customer retention, which was a challenge. Instead of seeing it as a negative, she sought to understand why the team was struggling with this initiative and showed the trainer/coach how to anticipate any problems or challenges they might have prior to training. This type of approach allowed the individual to focus on the real obstacles and concentrate on the quality of the material. What made the team successful was not the training, but rather how Wendy showed exceptional leadership skills to maintain the learning. She regularly checked in and asked how the team felt about their learning and took action based on what they shared. It was always tailored to the individual representative; they all have a different story to share on how Wendy supported them. The common theme was that she expanded their individual skill sets and helped them take more ownership of their personal contribution. She offered regular feedback,

allowing them room to make mistakes so they could learn from them, and scheduled coaching time to build their confidence and skills. Wendy also set up a reward program to encourage the team members individually and to celebrate as a team. When giving praise, she was not generic, but rather offered specific details when identifying their strengths. She recognized and cheered them on, both publicly and privately. Sharing success stories with the group made individuals feel appreciated and valued; reading others’ success stories motivated others to push themselves and encouraged them to be more productive. A year later, Wendy’s team has maintained an increased retention rate, and despite this success, Wendy has never taken the credit; she has allowed the team to embrace its own achievements and gives full credit to the team. This is just one of many examples that illustrates how Wendy motivates them to perform at a World Class Customer Satisfaction level.

—Wendy Chevette,
Canadian Tire Financial
Services

**DE-ESCALATING CALLS—
CALMING EVEN THE MOST
FRUSTRATED CALLERS**

“Callers may have been frustrated, angry or even upset to begin with, but they were always different and much calmer after speaking with Patti.”

As a World Class Certified and seasoned representative, I felt extremely confident in handling difficult calls and maintaining call control, always defusing difficult situations before they became escalated. In 2013, I was promoted to a Customer Service Team Leader where coaching other representatives became my

primary assignment. As a newly appointed Team Leader, I felt a responsibility to always be involved with our representatives and to diffuse those difficult situations before they escalated.

During my first week as a new team leader, I overheard a representative on a very difficult call. I stepped in to help, but the situation quickly escalated and I found myself on my very first supervisor call as a leader. I had handled supervisor scenarios at previous employment, but never in regards to anything as important as a person’s healthcare. As a CSR, I rarely found myself in a situation where things were escalated from the very beginning, leaving me feeling as if I already had two strikes against me. Regardless of this, I took the call and asked the member several confirmation questions to let him know that I understood his concerns, but was quickly cut off before being able to finish. Hearing me on one of my first supervisor calls, Patti began to listen in from her desk close by, and coached me through the call as she was a subject-matter expert on prescriptions and escalation. Afterward, I explained how I had difficulty with the call since it was already escalated before getting to me. Patti took the time to explain that there are different skills needed for taking a difficult call as a CSR and taking a difficult call as a supervisor. In the following weeks, Patti continued to help me, coaching me before and after each callback to this particular member and each call got progressively easier. Over the next couple of months, my desk remained close to Patti’s and I overheard her on several supervisor calls during this time. I noticed that, on

her calls, she always remained calm, her tone was always great, she was always confident even if she had to research an issue further, and that she consistently acknowledged her caller's concerns. While these callers may have been frustrated, angry or even upset to begin with, they were always different and much calmer after speaking with Patti. I could gradually hear the calls de-escalate.

Today, I am still a Team Leader on Patricia Nieusma's team, and while she has taught me a great deal about handling escalated calls in the short time I have been a leader, she continues to be consistently available to answer my questions or coach me through difficult situations. She does not have a door to close or open, but she has a great office chair to sit in whenever I have a question or concern, and I know that it is always available.

—**Patricia Nieusma**,
BlueCross BlueShield of
Vermont

**PROMOTING EMPLOYEE
SATISFACTION—UNDERSTANDING
THAT HIGH CSAT DRIVES POSITIVE
CUSTOMER EXPERIENCES**

"Amin took it upon himself to drive employee satisfaction, not

just on his team, but across our organization."

Amin Sumar is a team lead who clearly understands the importance of customer satisfaction, but also understands how high employee satisfaction drives positive customer experiences. In 2013, Amin took it upon himself to drive employee satisfaction, not just on his team, but across our organization through a committee he led called CultureNet. This committee was focused on creating employee engagement activities on a number of levels that truly drove satisfaction in the workplace. Amin's leadership was crucial in driving the high improvement we saw in employee satisfaction. Amin did this while still focusing heavily on First Call Resolution within his direct team. He did this with a focus in team meetings, coaching sessions and email communications. His employees learned to position their calls where the customer felt as though their concerns were being dealt with from start to finish consistently. Additionally, Amin was given the task of identifying World Class agents in our organization through the SQM Wall of Fame. This board was updated

quarterly with agents' photos and monthly SQM call center stats, and they were given recognition for a 100% of World Class Calls with reward points. Amin has had a very busy year, and has driven positive focus on employee and customer engagement through a number of channels. We could not be more proud of his success!

—**Amin Sumar**, ENMAX

**PERSEVERANCE, LEADERSHIP AND
PRACTICALITY EQUALS SUCCESS—
COACHING TO HELP GROW BOTH
CSRS AND THE TEAM**

"Shelly would often share positive calls with our team showing us what other team members did well, especially with the simple turn of a phrase."

Shelly has been an excellent supervisor, I was on her team for approximately five years. I was one of the original CSR & Claim Processors under her leadership. It was a challenge early on to get training and time to process claims, but Shelly persevered and kept her team members in the loop all along. On the CSR side of business, Shelly was constantly listening to calls and giving me feedback from the member's point of view. It helped me grow to not only to tell the member the business information needed,

but also how to apply it in a practical way that would make sense to the caller. I have been a World Class Certified CSR since the inception of the program and I'm on track again for the seventh year. Shelly would often share positive calls with our team showing us what other team members did well, especially with the simple turn of a phrase. Shelly also instituted an open enrollment certification process during September and October 2013. The goal was to make sure that we were providing potential new members with the necessary information about their client-specific VSP plan in a way that positively influenced them to join VSP. I am happy to report that I earned that certification with guidance from Shelly. Sometimes I dreaded going into a one-on-one session, but always came away energized and ready to start anew. Over the year, I did meet my goals for Calls Resolved and CSR CSAT. I've had trouble with cost per call and wrap-up stats, but Shelly helped me focus on these areas to meet the overall standards. Shelly has helped me to grow and become a better CSR.

—**Shelly Limpach**, VSP
Vision Care

ABOUT CONTACT CENTER PIPELINE A MONTHLY INSTRUCTIONAL JOURNAL DEDICATED SOLELY TO THE CALL CENTER INDUSTRY

CONTACT CENTER PIPELINE is a fresh, informative, cutting-edge monthly journal focused on the specific needs and challenges of the contact center. Our advisory board, editor, writers and contributors are known for their unique understanding of what makes the call center the organization's driving force for attracting and retaining customers and employees, and ensuring long-term success. CCP subscriptions are available in print and/or online in electronic format.

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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. SQM benchmarks over 450 leading North American call centers on an annual basis. For the average call center 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 VoC expert for analyzing FCR, Csats, 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, Csats 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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