



# The 8<sup>th</sup> Annual Government Customer Support Conference and Expo

Produced by High Tech High Touch Solutions, Inc. and the remarkable GCSC board members

A very special thanks to Chairperson, Daryl Covey from NEXRAD

## Conference Roadmap to Education, Inspiration, Networking and Fun

*"Welcome to the 2009 GCSC event! We hope you have a wonderful time and make new acquaintances. We will do "Whatever it Takes" to create an educational and memorable experience for you. You have my promise!"*

*Try Meadors*

### Conference Sessions

Sessions are held in three specific rooms. Each track is assigned to a specific room to make it easy to find. Sessions vary in length so be sure to check your program carefully.

If you would like to visit multiple sessions during one time frame or find yourself in a session that is not what you were looking for feel free to quietly exit and go to another session. It is important that you receive the education you desire and have the flexibility to experience the event to its fullest.

### Flash Drives

Flash drives include the majority of the speaker's slides and numerous handouts. The slides included are in PDF file formats. Additional flash drives are available for purchase at registration.

### Need Assistance

If you have any questions about the program, need recommendations on which sessions to attend, have issues with the hotel service or anything else, please ask any conference host or simply stop by the registration table. Your personal experience is extremely important to us. We will do whatever is needed to ensure you have a positive educational experience.

If you need anything, please call 206-619-HELP.

### We rely on your feedback

Please fill out all your surveys for both the overall conference and the individual sessions. Your input is invaluable to our future program designs. We read every single survey and apply a large majority of your ideas. The speakers appreciate your input, provided to them anonymously. They use it to learn and grow from your recommendations. Your surveys are your ticket to win the giveaways from our sponsors so be sure to turn them in at registration or give them to a Room Monitor.

### Be a winner!

There will be Bingo Card drawings during each luncheon and survey drawings at the closing session on Wednesday. There are numerous giveaways to win. You must be present to win at all drawings.

### VIP SPONSORS



### VENDOR ALLIANCES



GSA Office of Citizen Services



The Greater New York City HDI Local Chapter



Daryl Covey hosts, and made the arrangements for, the evening networking activities.

**FREE** call center site tour included with your conference registration.

Sponsored by the USPTO.

**EMAIL SOLUTIONS4U@HHTS.COM to reserve your place on one or all of the tours.**



**SUNDAY: Ride the Water Taxi down the Potomac to Georgetown for dinner**

**Sunday evening, May 3** (the evening before the conference begins)

Leave at 5:00 pm and catch the water taxi at the foot of King Street.

At Georgetown, we will walk to a restaurant for dinner and return about 8:00 pm.



**TUESDAY: Dinner at Union Station and Monument Tour**

**Tuesday evening, May 5** (the second night of the conference)

Leave at 5:00 pm and travel by Metro to Union Station for dinner in the food court.

The monument tour departs Union Station at 6:30 pm returns there around 9:30 pm.

We will return via the Metro about 10:30 pm.

**WEDNESDAY: USPTO Free Call Center Site Tour**

**Wednesday afternoon, May 6** (following the conference closing)

Onsite tour is from 2:00 – 4:00 PM.

Meet in the hotel lobby at 1:30 or meet us at the USPTO office no later than 1:45 PM.

**You must be a registered conference attendee to go on the site tour.**



**WEDNESDAY: Dinner cruise on the Potomac**

**Wednesday evening, May 6** (following the USPTO Call Center Site Tour)

Leave at 6:00 pm and board the dinner cruise at the foot of King Street.

The food is great and the sunset scenery on the Potomac is magnificent. We will arrive back by 10:30 pm.

**EMAIL SOLUTIONS4U@HHTS.COM to reserve your place on one or all of the tours.**

Monday 7:30 – 8:30 AM  
Registration and Complimentary Coffee and Tea

Grand Ballroom Foyer

Monday 8:30-9:00 a.m. Grand Ballroom

**WELCOME AND INTRODUCTION BY CONFERENCE HOSTS:  
DARYL COVEY (NEXRAD) and IVY MEADORS (HIGH TECH HIGH TOUCH SOLUTIONS)**

Monday 9:00–9:50

FEATURED KEYNOTE

Grand Ballroom



**Seven Star Customer Service: Starting at the Top to Impact the Bottom Line**

*Ruby Newell –Legner, Ruby Speaks, Inc.*

As our customers expect more and more from us, the demand on our frontline employees becomes more intense. How can we help them develop the tools to excel in their job of representing our agency so we can grow our business? How do we overcome interdepartmental boundaries so that everyone is providing an exceptional level of service throughout the organization?

In this session, we will explore management's role in promoting a positive guest experience at all levels of the organization. Come discover how to make well-integrated service delivery a reality.

Attendees will learn to:

- Explore customer service concepts and techniques for managing front-line service providers all the way up to the top leaders of the organization
- Outline the cycle of service for your organization so that you can develop standards for each step in the cycle
- Clarify expectations that must occur in a timely manner to deliver excellent service.
- Identify communication techniques that create seamless service systems
- Develop strategies to promote positive interactions among the employees to promote, produce and delivering exceptional service
- Discover employee interactions that are critical to service excellence and then design agency-wide practices to support them

**Meet the Speaker:**

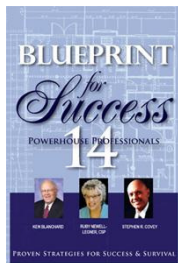
Ruby Newell-Legner, Certified Speaking Professional, founded RubySpeaks, Inc. in 1994 with a singular mission: To provide the hands-on training employees need to create a more productive work environment where everyone can excel on the job. Over the last decade, she has presented more than 1,700 programs in nine countries and has shown tens of thousands of participants how to quickly improve workplace performance. She has provided customized training programs for over 250 municipalities in North America.

Ruby's high-impact trainings are based on 25 years as a front-line service provider and facility manager. As a previous municipal staff member, she understands the challenges that government employees face in meeting the demands of their citizens.

With "in the trenches" practical expertise, Ruby has an uncommon level of experience that gives immediate credibility with session participants and allows her to offer suggestions and recommendations based on actual hands-on experience. Her clients range from NFL stadium management staff to leaders in municipal government to Jumeirah International, the Dubai, United Arab Emirates, based luxury hospitality group that has the only seven-star hotel in the world, the Burj Al Arab. Because of her expertise in customer service training, she recently began training staff to host both the Super Bowl XLI and the 2010 Olympics.

A nationally recognized training expert, Ruby is also a facilitator with a proven ability to create environments where groups can brainstorm effectively, share perspectives and come to consensus-while enjoying the process. She helps organizations like yours build strong teams between front line staff and management, and make exceptional customer service a way of life.

Ruby is a Certified Speaking Professional, a designation bestowed by the *National Speakers Association* to less than 400 speakers in the world.



**Secrets to Keeping Our Customers Happy!  
A Customer Service DVD Training System**

**"Master THE World's Most Valuable Skill,  
Pump Up Your Staff,  
And Put Your Business On The Map...!"**

This power-packed training program has already helped thousands increase their revenues and tighten up their customer service skills in a live event format. We took the raw materials from Ruby's intense hands-on training, and tirelessly **edited them into the equivalent of a college**

**crash course with practical application, ready for immediate implementation!**



### Guide to Managing and Mentoring a Multi-Generational Workforce

Ivy Meadors, High Tech High Touch Solutions, Inc.

*Develop a superior team by capitalizing on different generational styles*

Each generation is inspired, motivated, and skilled in unique ways. How we communicate, lead, and build loyalty within our support teams has become a greater challenge than ever before. With Baby Boomers, Generation X and the Millennials, today's workplace is becoming more interesting and fun but requires some creative ways to manage the generations.

This session will help you better understand the different styles to develop a superior team that works well together. The primary focus will be on the Millennials.

#### Take-aways:

- Handout loaded with key resources on the topic of the different Generations ranging from the Silent Generation to the Millennials.

#### Meet the Speaker:

Ivy Meadors, founder and CEO of High Tech High Touch Solutions, has over 30 years of experience in the customer service and support industry, is a seasoned consultant and a world-renowned professional speaker who has traveled the globe to deliver her content rich presentations. She is the owner and producer of the Signature Customer Service and Support Conference and Expo and the Government Customer Support Conference and Expo.

One of her loves is the psychology of people and animals. This interest includes a passion for understanding people from different age groups and their behavioral styles to a more advanced level. She has had innumerable opportunities to mentor individuals in the various age groups and study their different communication styles.

Ivy is an active member and professional speaker designated by the *National Speakers Association*.

#### Benefits of Attending

- Understand the similarities and differences of each generation and how to help them work together best
- Increase communication and productivity in a multi-generational workplace
- Learn ways to work effectively with the Millennials and mentor them to be successful



### Best Practices: Remote Workers: Revolutionary Change for the Contact Center

Cindy Auten, Telework Exchange

*Telework: Hear how you, your organization and the environment will benefit from telework*

Business continuity, green initiatives, need to increase work-life balance and efforts to increase productivity and limit costs are the reasons Telework is gaining momentum in both the public and private sectors.

This session will demonstrate the many benefits of telework; address employee eligibility and how to overcome management resistance, technology shortfalls, and security concerns.

Join Cindy as she leads you through several case studies of Federal and state agencies, including, the U.S. Patent and Trademark Office's remote call center.

#### Take-aways:

- *The Teleworker* – Telework Exchange's newsletter
- Telework Exchange bumper stickers

#### Meet the Speaker:

Cindy Auten serves as general manager for Telework Exchange ([www.teleworkexchange.com](http://www.teleworkexchange.com)), an online community and public-private partnership focused on promoting telework in the government. The organization provides a venue for government employees interested in telework, those who currently telework, assigned coordinators, government managers, information technology professionals, and telework proponents to dialogue on the subject matter.

Auten is featured as a telework subject matter expert on Federal News Radio, WTOP, and NBC4 News, as well as a number of other broadcast, IT, and government media outlets.

#### Benefits of Attending

- Learn about eligibility and cost savings gizmos and how to apply them to jump start your telework program
- Discover the technology available to enable communication for teleworkers and ensure security
- Hear what other organizations have done and how you can apply their techniques and polices to your organization
- Determine why telework is a possibility for call center employees and how it will benefit you and your organization and the environment
- Understand how to use telework as a recruitment and retention tool, enabling organizations to hire employees regardless of location, and to increase productivity and job satisfaction



### How Self-Service Will Add Muscle to Your Contact Center

Bill Price, Driva Solutions

#### Have you Implemented a “well-designed” Self Service Strategy?

Well-designed self-service on the web and on IVR phone systems can add muscle to your contact center by providing answers to nagging questions or by enabling data entry, all without taxing your agents and adding more center capacity. The key is making sure the self-service is truly “well-designed”. Unfortunately, too many attempts fail, causing frustration with your customers and your agents.

In this session, Bill Price will share stories and lessons learned from his book, “The Best Service is No Service,” such as reducing support staff headcount by 20%, while increasing transactions by a factor of 6 or 8!

#### Takeaway:

- Tips on how to build a winning business case

#### Meet the Speaker:

Bill Price founded Driva Solutions, LLC in September 2001 after serving as Amazon’s first Global VP of Customer Service. He also co-founded the 10-country LimeBridge Global Alliance to help build their clients’ customer service strategies and improve operational performance and chairs the 34-company Global Operations Council that he formed in early 2002 to share “best practices and worst experiences”.

Bill started his career with McKinsey in its San Francisco and Stockholm offices, working on what turned into In Search of Excellence; was then COO at early IVR service bureau ACP, which MCI acquired; built MCI Call Center Services’ automation, consulting, and agent outsourcing divisions; and was named one of the first Call Center Pioneers in 1997.

Bill is a frequent keynote speaker, graduate school CRM instructor, and advisory board member. Wiley & Sons published his first book, The Best Service is No Service, in March 2008. He graduated from Dartmouth College and the Stanford Graduate School of Business, and lives in Bellevue, Washington.

#### Benefits of Attending

- To learn how to select the right reasons for self-service
- To design highly successful self-service applications on the web and on IVR phone system
- How to “turn lemons into lemonade”, or coping with failed self-service



## 2009 Government Customer Support Excellence Awards Ceremony

11:15 – 1:30 in the Grand Ballroom

Networking Luncheon and Meet the Event Partners



### Extended Session – Workshop Part 1

## Ten Essential Leadership and Business Management Skills for Customer Support Managers

Rae Ann Bruno, Business Solutions Training

Just what does it take to be a great leader? Are they born or are they made? Although answers may vary from person to person, 10 essential leadership and business management skills lay a strong foundation.

During this interactive, two-part workshop, learn the 10 essential leadership skills and why they are important. These skills lay the groundwork for building effective teams and improving performance and productivity.

#### Take-aways:

- Handout with leadership tips and references for additional information
- Recommendations and sources for leadership articles, books, training, etc.

#### Meet the Speaker:

Rae Ann is the President of Business Solutions Training, Inc. and a veteran trainer who focuses on building teams, re-engineering processes, and communications. She also has experience with ITIL implementation through consulting efforts as well as real world experience when she was an IT Practitioner. With the executive IT team, she facilitated the implementation of ITIL processes during her tenure as the Director of IT Customer Service for Siemens Energy & Automation (SE&A). She built an IT training and documentation department, re-engineered the Service Desk, and implemented Incident Management, Problem Management and Service Level Management across the IT organization.

She came to SE&A from Cutler-Hammer where she re-engineered the Support and Security teams in her role as Enterprise Support Manager. In her previous role as the Training & Documentation Manager, she worked closely with the business units to develop and deliver business-focused training and support.

Her training team won the Cutler-Hammer Award for their innovative and successful training program focused on raising the computer literacy of the Cutler-Hammer sales force through organized peer training.



### Case Study: Customer Experience Makeover - A Practical Approach to Differentiated Service

Kevin Paschuck, RightNow Technologies

Using multi-channel customer solutions to cost effectively improve the customer experience

Today's customers expect your agency to act like a private business – providing fast web self-service, expedient answers via email and the convenience of voice automation so they can quickly get the answers they need. In addition, you are dealing with mandates to deliver a growing number of services, tight or declining budgets, and the retirement of knowledgeable staff. Multi-channel customer relationship management solutions are proven to cost effectively improve service levels at all levels of government. Regardless of how your customers choose to reach you – through the phone, e-mail, live chat or the web – you can cost-effectively provide them the information they need, quickly and accurately, every time.

This case study presentation offers a proven eight-step strategy and real-world examples for delivering a great customer experience. Starting with the creation of a strong knowledge foundation, this strategy ensures that customers get what they need, when they need it. Follow these 8 steps and learn to improve the customer experience and service levels across all channels, reduce staffing requirements, optimize organizational productivity, and capture staff knowledge.

#### Take-aways:

- Hard copies of our scorecard titled: Baseline Your Experience Delivery. Quickly assess how easy it is for your customers to communicate with you and a link to industry resources to learn more about multi-channel customer care.

#### Meet the Speaker:

Kevin Paschuck has been a leader in information technology sales and Management for more than 12 years. As Vice President for RightNow Technologies Public Sector Organization which includes Federal Civilian Government, Department of Defense, Intelligence Community, Higher Education and State & Local Government. Kevin first joined RightNow Technologies in 2006 and has held several leadership positions with RightNow including Director, Federal Government and Vice President, Federal Government prior to being promoted to his current position of Vice President, Public Sector.

#### Benefits of Attending

- Apply the 8 steps to deliver exceptional customer experiences across every channel
- Cut costs substantially through self-service and increased staff productivity – which is critical as demands increase and budgets get tighter
- Provide easy, immediate access to information by leveraging a centralized knowledge base across all channels
- Explore strategies and technologies that empower customers and employees
- Improve customer satisfaction levels while lowering operational costs



### Learn Key Ways to Integrate Change and Release Management for IT Project Success

Lou Hunnebeck, Third Sky

#### Successfully Integrating Projects with Change and Release Management

In most organizations, the goals of projects and project management seem to be at odds with the goals of Change and Release Management. Projects have deadlines to hit, while Change and Release want to protect the live environment from poorly tested, poorly prepared change. Come discuss ways to integrate and align the missions and activities of these areas and answer the question, “Can’t we all just get along?”

#### Takeaway:

- Sample Project to Change & Release Map

#### Meet the Speaker:

Lou Hunnebeck is an IT Service Manager and ITIL v3 Expert with over 20 years of experience in service industries. Ms. Hunnebeck is currently Third Sky Inc.’s VP of ITSM Strategy. Her passion for improving how we work has led her to IT Service Management from a background of process consulting, training and Help Desk/Service Management systems consulting. Ms. Hunnebeck has led global teams in best practice and methodology design, served on the public quality assurance team for ITIL version 3 and is currently a member of the ITIL version 3 Examination Panel for the Lifecycle stream.

#### Benefits of Attending

- Understand the difference between Business Change Management and Operational Change Management.
- Learn the roles Change Management and Release Management play in the successful execution of an IT project.
- Increase project success through coordination and compliance with Change Management and Release Management.
- Learn keys to successful integration.
- Create an action team with representation from PMO, Change Management and Release Management.



### Extended Session – Workshop Part 2

#### How to Transform your Agents into Successful Communicators

Rae Ann Bruno, Business Solutions Training

The second half of this workshop will focus on ways you can improve the communication skills of your team members. Most employees site Communications as an area for improvement in their companies. This may be at an individual or organizational level.

In this session, we will explore four Communication styles, tips for effectively communicating with different styles, and ideas for growing your team’s skills. Strong communication skills lead to motivated employees who provide excellent customer service.

#### Take-aways:

- Handout with Communication tips
- Recommendations and sources for assessing and improving communications skills

**Meet the Speaker:** Rae Ann is the President of Business Solutions Training, Inc. and a veteran trainer who focuses on building teams, re-engineering processes, and communications. She also has experience with ITIL implementation through consulting efforts as well as real world experience when she was an IT Practitioner. With the executive IT team, she facilitated the implementation of ITIL processes during her tenure as the Director of IT Customer Service for Siemens Energy & Automation (SE&A). She built an IT training and documentation department, re-engineered the Service Desk, and implemented Incident Management, Problem Management and Service Level Management across the IT organization.

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## Session Sponsored by Oracle



### Case Study: Optimizing Your Contact Center's Performance with Service Analytics

Lee Anne Arslan, National Science Foundation

Excellence in Government support starts with customer service. This case study presentation will demonstrate through real world examples how service analytics can increase customer satisfaction by providing powerful insight, enabling analysis of all aspects of contact center performance.

Ms. Arslan will discuss how the National Science Foundation evolved from reactive and manual processes to an approach empowered by real time business intelligence. Easily accessible, reliable and actionable information has replaced ad hoc reporting. With the ability to readily monitor key process indicators, NSF managers can now identify trends and take proactive steps to ensure all customer service targets are met.

Service Analytics enables NSF to analyze all aspects of contact center performance and results. Dashboard views support targeted action, improving employee productivity and increasing customer satisfaction. This standardized presentation of relevant data not only enables faster decision-making, it fosters a repeatable and consistent approach to service delivery.

Ms. Arslan will discuss the approach NSF followed as they identified their needs, established a business case, conducted market research and managed a highly successful implementation.

#### Meet the Speaker:

Lee Anne Arslan is the Chief of the Customer Support and Assessment Branch (CSAB) at the National Science Foundation in Arlington Virginia. Housed within the Division of Information Systems (DIS) her responsibilities include managing the consolidated call center services that support approximately 2000 internal customers and over 200,000 national and international members of the research community. The call center serves as the single point of entry into the service request system and includes walk-in support, desk-side services, desktop management and engineering services, technology assessment and customer relationship management. Prior to joining NSF in 2002, Lee worked at NASA Headquarters where she held positions of increasing responsibility, culminating as the Manager of User Services.

#### Benefits of Attending

- **Customer Service**—Optimize performance across multiple service channels to achieve greater process efficiency and maximize service effectiveness and customer satisfaction
- **Agent Performance**—Increase service effectiveness while minimizing costs; optimize staffing levels for anticipated call volumes and service request types; and gain insight into how training, tenure, and rewards impact agent performance
- **Service and Delivery Cost**—Track and measure initial incident-to-issue resolution rates; measure service costs by customer, channel, and product type to reduce overall service costs; and maximize customer satisfaction



### How to Use Speech Analytics for Advanced Agent Training and Improved Business Processes

Jeff Schlueter, NEXIDIA, Inc.

Contact centers today have a wealth of information at their fingertips that holds the key to improving business processes and controlling costs; however the goldmine of intelligence contained within their call center recordings goes largely untapped due to the sheer volume of data. With speech analytics, organizations now have the power to instantly tap into the actual voice of the customer and extract the type of compelling intelligence that drives real business value.

Companies can automatically identify and monitor key issues and activities that affect their call center without listening to each call to: uncover training opportunities, expose procedural inefficiencies and improve customer satisfaction. They can also reducing call-times, escalations and repeat contacts on a single issue to significantly lower costs.

#### Take-aways:

- Best Practices in Speech Analytics White Paper
- Speech Analytics Demo CD

#### Meet the Speaker:

As Vice President of Marketing and Business Development, Jeff is responsible for developing and implementing the Nexidia corporate marketing strategy. In addition, he works to develop new markets for Nexidia technology, and has led the growth of Nexidia's business in legal audio discovery. Jeff brings 17+ years of telecom and marketing experience to Nexidia. He served as the Executive Director of Product Management at Cingular Wireless where he was responsible for the development and lifecycle management of all voice-related products and services in the Cingular portfolio. Jeff was also the Executive Director of Customer Base Marketing, responsible for all marketing programs into their base of 22 million subscribers for retention and revenue stimulation. Additionally, Jeff has held executive positions at Linx Communications, Boston Technology and US West, Inc. Jeff holds a Masters in International Management from Thunderbird (AGSIM).

#### Benefits of Attending

- Understand how to use the “voice of the customer” to identify process improvement opportunities
- Learn how to identify your most costly call drivers for maximum effect and faster payback
- Learn how to target relevant issues that can decrease call handling times and reduce repeat callers
- Learn how to maximize your hiring and training dollars by identifying triggers that can help boost contact center representative performance
- Hear how several customers have achieved significant cost savings with insights gained using speech analytics



**Monday 4:00 – 4:20**  
**AFTERNOON REFRESHMENT BREAK**  
 Sponsored by **ORACLE**

**Monday 4:30–5:30**

**Track 1: Lessons on Leadership**

**Grand Ballroom**



**A Step-by-Step Strategic Guide to Turbo-charge Your Contact Center**

Susan Grow, Federal Consulting Group

**How to Develop a Strategic Plan for Your Contact Center or Help Desk**

Strategy has always been an important element of success within organizations. In contact centers (especially those in governments), intense competition for limited financial, human capital and other resources, and the magnitude and speed of change, increase the importance of strategic planning. Now, more than ever, leaders of government contact centers and help desks need to have a clear business strategy for their organizations that defines who they are and where they are heading.

Many government contact center leaders become so embroiled in their day-to-day challenges, they feel they don't have time to develop their strategies and document them in a plan. Certainly, these "challenges" must be managed. What happens when there is no overall business strategy? Sadly, the answer can be chaos. As a contact center leader, do you feel as though you are simply managing chaos?

Whether you are developing your center's strategy statement, or communicating the strategy throughout your center, or even refining your measurements for strategic success, this session will provide you with a step-by-step "how to" guide. This guide will help you develop a contact center strategic plan to frame and guide the decisions contact center and help desk leaders and employees make every day. Having a strategic plan won't make the "challenges" go away, but it will help keep everyone pointed in the right direction so that managing those challenges is less chaotic!

**Take-aways:**

- White Paper: Guide to Developing Your Contact Center's Strategic Plan
- Bibliographic listing of relevant additional resources

**Meet the Speaker:**

Susan Grow has extensive experience as a manager of multiple contact centers, program manager for customer satisfaction measurement programs and performance measurement consultant. She has led the development of strategic plans for a Fortune 100 company. She is currently a federal employee who provides internal performance measurement consulting for federal departments and agencies. Susan's academic background is in Business Administration and the Measurement of Management Performance.

**Benefits of Attending**

- To understand the benefits of having a strategic plan to help you be more consistent at achieving your center's objectives
- To learn how to develop your center's strategic plan
- To gain tips on how to communicate your plan
- To understand how to translate strategies into relevant measurements
- To gain knowledge to improve your center's strategic value

**Monday 4:30–5:30**

**Track 2: Business Strategy & Best Practices**

**Washington Room**



**Best Practices for Improving Government Customer Service: A Roadmap to Success**

Karen Trebon & Robert Smudde, GSA

**Part 1:** GSA's Office of Citizen Service (OCS) is home to USA.gov, 1 (800) FED INFO, and the famous Pueblo, Colorado publications facility. In late 2008, OCS worked with Forrester Research to survey over 5,000 Americans about government customer service. Hear what citizens told us about Web 2.0, contacting the government when they're on the go, and improvements needed in websites, contact centers, and service levels. The second half of this session will focus on how to make these and other improvements happen.



**Part 2:** OCS recently completed a comprehensive study to identify successful practices in the federal government for measuring customer satisfaction. The study includes a road map to success and an analysis of survey methodologies. This session will include best practices from this study as well as case studies and information from two additional reports completed in early 2009 on best practices for creating awareness and promoting customer service channels and for successfully consolidating customer service channels and FAQ knowledge databases.

**Benefits of Attending**

- Learn how agencies successfully market their programs
- Learn how agencies successfully consolidate customer service programs and data
- Learn how agencies meaningfully measure customer satisfaction
- Learn how and where government employees are networking to share information and best practices
- Hear citizen opinions on improvements needed in government customer service

**Take-aways:**

- Case studies on creating awareness, consolidating services and measuring customer satisfaction
- A list of resources for future help and hard to come by data that is specific to government customer service

**Meet the Speakers:**

**Robert Smudde** has been with the federal government six years after spending nearly 15 in the private sector as a business consultant helping corporations improve services and relationships with their customers. Robert chairs the Government Contact Center Council and leads the Government Customer Service Community of Interest. His specialties are helping agencies improve the quality of service they give their customers and managing studies to gather the information government needs to continuously improve customer service.

**Karen Trebon** has been with OCS for seven years. She was one of the facilitators of CSLIC, the Citizen Service Levels Interagency Committee, an interagency group that drafted best practices for government call/contact centers. Karen administers an annual awards program that rewards federal agencies for customer service excellence, and has expertise on how web 2.0 technologies are being used in government.

**Monday 4:30–5:30**

**Track 3: Technology and Trends**

**Jefferson Room**



**Green Customer Support: Taming the Environmental Beast**

Stephen Fletcher, State of Utah

**Going Green in Utah through a Process of Online Citizen Service Initiatives**

We live in a world of finite resources. Increasingly, government agencies are asked to reduce budgets and contribute to a global effort to conserve resources. At the same time, technology has provided a wide range of opportunities for doing the work of Government more efficiently. This includes customer service, which, in a digital world, needs to be available 24x7.

The presentation will focus on key Utah online service initiatives and how they reduced energy consumption, eliminated waste and enhanced citizen satisfaction.

**Benefits of Attending**

- Learn about implementing environmentally friendly services
- Be able to provide a 24x7 support structure that works
- Develop effective outreach services to the customer
- Build partnerships to provide quicker and better access to information and services that are supportable and sustainable
- Re-evaluate how we work in a changing world

**Meet the Speaker:**

J. Stephen Fletcher was appointed by Governor Jon M. Huntsman, Jr. in April 2005 to serve as the state’s Chief Information Officer and Executive Director of the Department of Technology Services. Under his service, the State has consolidated all IT services into one new department to reduce costs, increase services to taxpayers, and more closely align IT with the business needs of the State of Utah.

As Executive Director of DTS he is responsible for all of the IT activities for the State Executive Branch agencies. His efforts have focused on optimizing IT services to the State by eliminating redundancies, enhancing accountability of IT resources, and implementing effective performance management strategies. These efforts have resulted in an overall costs savings and enhancement of IT services to State Agencies.

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**Monday Evening is Free for You to Relax and Enjoy Beautiful Alexandria!**



**Take new and old friends to dinner, catch a movie or just kick-back and hang-out.**

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Tuesday 7:45– 8:45

Grand Ballroom



## Mastermind Sessions and Continental Breakfast

*One of the most popular sessions in the event:  
Pick your favorite topic and join in the engaging discussions*

Tuesday 9:00 – 9:45

FEATURED KEYNOTE

Grand Ballroom



The Keynote speaker expected to deliver this session is **United States Representative Congressman Henry Cuellar**. The final confirmation is pending a notification from their Administration.

### Meet the Speaker:

The Wall Street Journal calls him “a pro-growth Member of Congress in the John F. Kennedy mold.” One of the seven best Texas legislators, says the Dallas Morning News. A favorite son of Laredo, the city has honored him as Laredoan of the Year, Distinguished Citizen of the Year, and Humanitarian of the Year.

In the advent Mr. Cuellar is unable to speak, Ivy Meadors will deliver the Keynote “**Business as Usual is NOT an Option: Trends that Will Transform Support Over the Next Five Years**”

Tuesday 10:00–11:00

Track 1: Lessons on Leadership

Grand Ballroom



### Case Study: CDC - Integrating Digital Media with National Contact Centers for the 2009 Peanut Recall / Salmonella Outbreak

Erin Edgerton, M.A., CDC National Center for Health Marketing  
Amy J. Burnett, M.P.H., CDC National Contact Center

Contact centers, online resources and social media are all crucial channels for interacting with the public during emerging health threats. Hear how the CDC integrated these communication activities to create a comprehensive strategy for informing the public about peanut butter and peanut-containing product recalls during the 2009 salmonella outbreak.



Working with the FDA and HHS, these collaborative activities included online widgets, outreach to bloggers, social network outreach, and coordination among web managers and contact center representatives. Evaluation metrics and lessons learned will be shared and participants will learn how to incorporate the social media into ongoing programs.

### Take-aways:

- Fact sheet and/or data brief

### Meet the Speakers:

**Erin Edgerton, M.A.**, is a Senior Social Media Strategist at the Centers for Disease Control and Prevention’s (CDC) National Center for Health Marketing (NCHM). In coordination with the HHS Center for Social Media, Erin develops integrated communication campaigns that leverage emerging technology, builds strategic collaborations for comprehensive social media outreach, and works with regional and national partners to develop new opportunities for reaching diverse populations.

**Amy Burnett** has been the Program Director of the Centers for Disease Control and Prevention’s National Contact Center, 800-CDC-INFO, since September, 2008. Previously, she was a Public Health Analyst with the CDC National Center for Health Marketing, Office of the Director. In this role, she led strategic performance management, project management, communication, and other priority initiatives for the Center. Before joining CDC in 2005, Amy was a project coordinator at the Emory University Center for Public Health Communication. Prior to that, she was an analyst at the HHS Office of the Inspector General, Office of Evaluation and Inspection.

### Benefits of Attending

- See examples of new media and learn how these communication channels can be used in your program.
- Learn how to integrate your contact center operations with new media technologies to maximize the reach of messaging and programs
- Gain awareness and knowledge of new media and contact center metrics to demonstrate effectiveness of these collaborations
- Hear lessons learned from a inter-agency collaborative project
- Learn about future trends in new media, digital communications, and contact center operations



### Extended Session – Workforce Management Workshop Part 1

#### Call Center Math: A Practical Workshop for Managing by the Numbers

Penny Reynolds, The Call Center School

Analyze call center statistics to identify areas for improved efficiencies and/or increased revenues

There are many truths told in the vast array of statistics available today in the call center-- and the successful manager or supervisor will be the one who understands how to manage by the numbers. This workshop provides a useful set of formulas and calculations for understanding call center math. You will learn about the most common measures of performance and how to calculate and analyze them. The session presents the most important calculations associated with determining staffing numbers and evaluating cost and service tradeoffs. You will also see various methods for analyzing the numbers and presenting them to senior management.

#### Take-aways:

- Free Power of One book
- Free Quikstaff software for performing and evaluating call center staffing tradeoffs

#### Meet the Speaker:

As a Founding Partner of The Call Center School, **Penny Reynolds** heads up curriculum development. She develops and teaches courses on a wide variety of call center topics and speaks at many industry conferences and association meetings. Penny has spent over twenty years in the call center and telecommunications industry, and is known as an industry expert on topics such as workforce management, application of call center technologies, and general call center operations and people management.

#### Benefits of Attending

- Identify the most critical measures of call center and agent performance and how to calculate them.
- Review basic math concepts and how to apply them in common call center scenarios.
- Define the formulas and rationale behind the most common staffing models.
- Identify the most common math mistakes made in call centers today.



### Case Study: DCMA: How to Achieve Significant Quality Improvement Using Lean Six Sigma and ITIL

Jacob Haynes, DCMA

This presentation will report on the results of an initiative at the Defense Contracts Management Agency to make significant improvements to a critical part of its IT application life cycle management using lean-six sigma practices and ITIL as a guide.

Mr. Haynes will focus on the role of leadership, planning, training, facilitation, and team mentoring in successfully deploying ITIL practices in a Lean improvement context. You will learn key aspects of the project and the significant improvements achieved as well as planned next steps to address planning and control aspects of IT Service Management.

#### Take-aways:

- White paper

#### Meet the Speaker:

**Jacob Haynes** is the Director of Software Acquisition for the Defense Contract Management Agency (DCMA). He is responsible for life cycle management of assigned Automated Information Systems (AISs) from receipt of requirements, through acquisition program management, to replacement or realignment of those systems. Mr. Haynes retired from the US Army after 27 years of service. He holds a B.S. from Winston Salem State University, an MBA from Monmouth University and a Masters in Strategic Studies at the United States Army War College. Mr. Haynes was awarded the "Federal 100" for program management, the first Government Leadership award presented by GCN and the Gracie award for Program Management.

#### Benefits of Attending

- Understand the high-level context for rapid deployment of ITIL best practices to address identified problem areas in IT service management
- Learn the benefits of introducing ITIL practices through process improvement
- Understand the advantages of an early Lean/ITIL project to demonstrate the benefits of ITIL and to prepare the organization and key stakeholders for a more top-down, systematic adoption of ITIL

### Session Sponsored by Tech Team Government Solutions

#### Case Study: OPM Retirement Services Program: Building a Winning Contact Center Strategy: Deciding What and When to Outsource

Nick Ashenden, Office of Personnel Management (OPM)

OPM's Retirement Services Program is responsible for supporting over 2.4 million Federal retiree and their survivors. Their contact center responds to complex questions about retirement benefits, many times from distraught callers who are going through times of stress. The highly variable workload led OPM to develop an outsourced overflow strategy to absorb surges and cyclical loads. Mr. Ashenden will describe how they have implemented a strategy that is responsive to their customers, operationally efficient, and very transparent to callers.

Join Mr. Ashenden as he discusses how to build and implement a winning contact center strategy with focus on lessons learned related to.

- Designing a contact center strategy focused on three basic concepts
- Voice of the Customer
- Internal Operational Effectiveness
- Employee Satisfaction
- Why a strategy is so important and how it ties into tactical decisions
- Selling your strategy to senior management
- Implementing your strategy throughout the organization
- Special focus will be given to reasons to outsource some or all of the contact center, using OPM's Retirement Services Program, which outsources the overflow, as a case study

#### Take-aways:

Presentation will demonstrate how to develop and implement a strategy, using OPM's Retirement Services Program as a case study. You will hear ways to outsource overflow activities, use tele-work approaches, and motivate agents.

#### Meet the Speaker:

Mr. Ashenden has over twenty years call center experience in both the private and public sectors, with the last five years being with the Federal Government.

Mr. Ashenden is currently the Deputy Assistant Director for the Retirement Operations Center at the Office of Personnel Management (OPM), which operates an underground facility in Western PA to process retirement and survivor claims for Federal Government employees. This facility also houses the record for all Government retirees. Before this assignment, Mr. Ashenden managed three small call centers, including an outsourced relationship.

#### Benefits of Attending

- Learn a strategy approach that has worked effectively and guides daily decisions
- Learn how to ensure all employees and contractors are focused on the same goals
- Learn how to determine what part of your operation to outsource
- Learn how to integrate an outsourced relationship into the contact center



#### Extended Session – Workforce Management Workshop Part 2 Call Center Math: A Practical Workshop for Managing by the Numbers

Penny Reynolds, The Call Center School

Analyze call center statistics to identify areas for improved efficiencies and/or increased revenues

There are many truths told in the vast array of statistics available today in the call center-- and the successful manager or supervisor will be the one who understands how to manage by the numbers. This workshop provides a useful set of formulas and calculations for understanding call center math. You'll learn about the most common measures of performance and how to calculate and analyze them. The session presents the most important calculations associated with determining staffing numbers and evaluating cost and service tradeoffs. You will also see various methods for analyzing the numbers and presenting them to senior management.

#### Take-aways:

- Free Power of One book
- Free Quikstaff software for performing and evaluating call center staffing tradeoffs

#### Benefits of Attending

- Identify the most critical measures of call center and agent performance and how to calculate them.
- Review basic math concepts and how to apply them in common call center scenarios.
- Define the formulas and rationale behind the most common staffing models.
- Identify the most common math mistakes made in call centers today



**Preventing Snowballs: Practical Ways to Realize Low Cost Resolutions**

Bill Price, Driva Solutions

Does your “Snowball” Need to be “Melted”?

Repeat contacts for the same issue frustrate customers more than anything else, and they disrupt your contact center operations. Yet today customers on average contact organizations 1.5 times before getting the answers they need. If you consider repeats as “snowballs” that need to “be melted”, you will see your first contact resolution soar and your overall cost to resolve plummet. In this session, Bill Price will share stories and lessons from his book *The Best Service is No Service*, starting with his years at Amazon where snowballs first started melting in large quantities.

**Benefits of Attending**

- Learn how to identify snowballs across contact channels and across multiple centers including outsourcing partners.
- Learn all about melting snowballs and reporting in “closed loop” to keep them down.

**Take-aways:**

- Tips on how to present the financial returns to benefit from low cost resolutions.

**Meet the Speaker:**

Bill Price founded Driva Solutions, LLC in September 2001 after serving as Amazon’s first Global VP of Customer Service. He also co-founded the 10-country LimeBridge Global Alliance to help build their clients’ customer service strategies and improve operational performance and chairs the 34-company Global Operations Council that he formed in early 2002 to share “best practices and worst experiences”. Bill started his career with McKinsey in its San Francisco and Stockholm offices, working on what turned into *In Search of Excellence*; was then COO at early IVR service bureau ACP, which MCI acquired; built MCI Call Center Services’ automation, consulting, and agent outsourcing divisions; and was named one of the first Call Center Pioneers in 1997. Bill is a frequent keynote speaker, graduate school CRM instructor, and advisory board member. His 1st book, *The Best Service is No Service*, was published in March 2008 by Wiley & Sons. He graduated from Dartmouth College and the Stanford Graduate School of Business, and lives in Bellevue, Washington.



**12:15 – 2:00 Grand Ballroom**

**EDS SPONSORS THE NETWORKING LUNCHEON THEN MEET THE VIP EVENT PARTNERS**

**Ideapalooza! Become More Effective Delivering Contact Center Service and Support on a Limited Budget**

Interactive panel discussion with:



**Yolunda Davis (IRS), Daryl Covey (NEXRAD), Doug Bear (Kitsap County), and Debra Siler (EPA)**

Join Ivy Meadors, in her legendary style, as she facilitates this high energy, interactive and information packed session! You will hear from a group of forward thinking peers in the support and service industry on practical and economical ways to deliver better service and support starting TODAY. Be prepared to be inspired! You will walk away with ideas you can put forth and use immediately for improved results.



**Unleash Your Leadership Potential: Seven Top Secrets to Becoming an Exceptional Leader**

Doug Bear, Kitsap County Public Works

Captain Your Own Ship and Unleash Your Leadership Potential.

Leadership is the only ship that doesn't pull into a safe port during the storm. This session provides seven tips to help you captain your ship, and ensure safe passage through the storm of high expectations and economic challenges. You'll learn strategies and techniques that improve your skills, empower your crew, and unleash the exceptional leader that lives in each of us. Come aboard for an exciting voyage to success!

**Take-aways:**

- Desktop card of inspirational leadership quotes and motivators

**Meet the Speaker:**

Doug Bear is the Strategic Communications Manager for Kitsap County, Washington. He created the County's first call center in 1994, and is managing the expansion to a full-service 3-1-1 center in Kitsap County. His leadership experience includes the U. S. Navy, serving as an elected official, serving on various Boards and Committees, directing theatrical productions and leading community groups and fund raising activities.

**Benefits of Attending**

- Learn why getting out of your office may be the best thing you've ever done.
- Understand the importance of setting a good example.
- Improve performance and build team unity through delegation.
- Raise the bar and be surprised by the results.
- Discover why what you say may not be as important as what you hear.



**Case Study: Putting Citizens First: Strengthening Government Service Delivery in the City of New York**

Jeanette Moy, City of New York

Centralizing customer service citywide for improved service delivery at every NYC Government touch-point.

The City of New York recently launched a centralized effort to improve customer service citywide. NYC government handles over 88.2 million annual contacts ranging from central, standardized services from 311 and nyc.gov to more personal customer interactions at over 700 citywide walk-in facilities. While many of NYC's agencies are just beginning to articulate a customer service strategy, others have more advanced customer service initiatives with robust quality control measures, customer satisfaction and employee training programs.

The City's immensely successful 311 contact center helped to identify many trends and challenges with the city's siloed agencies and legacy systems. By establishing service level agreements at 311 for all city services, New York is working to increase accountability, ensure public transparency and set customer expectations.

Join Jeanette and Jeff to learn how the Customer Service Group within the Mayor's Office of Operations is leading the effort to improve customer service at every NYC Government touch-point.

**Meet the Speakers:**

**Jeanette Moy** is a Senior Policy Advisor with the Mayor's Office of Operations – Customer Service Group (CSG). Her experience in the private sector focused on customer strategy and consumer engagement. The primary responsibility of CSG is to develop and implement a set of citywide customer service policies and standards to improve the New York City customer experience. Ms. Moy has spearheaded the citywide effort to establish meaningful customer service measures. She also manages the development of key tools that will support the City's customer service agenda, including the creation of a practitioners' guide for customer service managers, a dynamic customer service training program, and citywide coordination for customer service technology. By enacting a multi-pronged strategy, including collaborative effort with agencies, executive involvement and both internal and external assessment tools, Ms. Moy has worked with CSG to develop a strong foundation for improving customer service citywide.

**Benefits of Attending**

- Learn why service level agreements are an essential component of managing customer expectations and government accountability
- Hear success stories on a citywide level in developing a customer service vision
- See how NYC balanced executive order, management buy-in and budget constraint
- Learn to create customer service standards in a budget-conscious environment
- Hear how to identify challenges in assessing multi-agency customer service operations
- Learn how to develop standards, with the appropriate implementation tools, at the municipal level



### Extended Session – Workshop Part 1

#### Game Changing Moves – Doing Business With Social Media

Joanne McGovern, GSA

**Social Media:** How government is leveraging powerful communication channels to deliver services in exciting new ways.

Do you think Facebook, YouTube, and Flickr are just for kids with too much time on their hands? Think again! Government agencies are harnessing the power of social media, engaging the public and delivering better services using these new tools. Even if you don't know how to tweet, blog or edit a wiki (yet), it's not hard to use social media to make your contact center more efficient, effective and accessible to your customers.

#### Take-aways:

- Tip sheet on how to use new media in your contact center
- Matrix of Web 2.0 Technology in Government

#### Meet the Speaker:

Joanne is a Senior Web Content Manager for the U.S. government's web portal, USA.gov, with strengths in information architecture and usability. On Tuesdays she's a blogger for GovGab.gov, where government employees blog about the staggering amount of U.S. government information and services we encounter in our daily lives that can benefit you.

#### Benefits of Attending

- Learn the basics of Social Media – social networking, blogs, wikis, widgets, mashups and more.
- Understand why your organization needs to get involved.
- See examples of best practices, including government initiatives ranging from blogs to Second Life.
- Get ideas on how to take your first steps into the wide world of social media.
- Learn how to be armed and ready when your agency management and lawyers want to run in fear.

Tuesday 4:00 – 4:15

AFTERNOON REFRESHMENT BREAK



#### Best Practices for Recruiting, Inspiring & Retaining: The Next Generation of Government Employees

April Harris, Office of Personnel Management

**Attracting and retaining talented men and women to work in the civilian workforce**

As baby boomers begin to move toward retirement, Federal human capital managers are facing increasing competition in attracting and retaining talented men and women to work in the civilian workforce. To meet this challenge, the Office of Personnel Management (OPM) is taking aggressive steps to assist federal agencies with recruiting and retaining the next generation of employees into Federal Government positions. These steps include streamlining the hiring process, updating job announcements, and marketing hard-to-fill and mission critical positions.

#### Take-aways:

- Handout listing references and links to policies, programs, and initiatives OPM is promoting to assist agencies with recruiting talent.

#### Meet the Speaker:

April Harris is the program manager in OPM's Division for Human Capital Leadership and Merit System Accountability Division. As program manager, she has assisted federal human capital managers throughout Government with developing and advancing a proactive approach to hiring. She is the lead program manager for the Career Patterns' initiative, which encourages federal agencies to shape their workforce planning efforts to build and operate a broad range of employer-employee arrangements to attract the talent they need to fulfill their mission. The initiative is currently phasing in the integration of Career Patterns into standard federal government job announcements. Ms. Harris has a Bachelor of Science degree in Public Administration and a Juris Doctorate degree in Law.

#### Benefits of Attending

- Understand the changing workforce environment
- Learn about core values and work attractors for multiple talent pools
- Learn how to leverage hiring requirements and flexibilities to attract talent
- Identify universal work environmental features that can attract multiple talent groups
- Learn about phase two of the Career Patterns initiative - "Looking for a Specific Work Environment" project ([www.usajobs.gov/infocenter/workenv](http://www.usajobs.gov/infocenter/workenv))





### The Secrets of Teaching and Training: Distilling a For-profit Call Center Strategy in a Government Environment

Jerry Feldman, CallSource

Distilling a for-profit call center strategy in a government environment.

If teaching and training really work, then why are we still behind our global competition in critical areas? What we have learned from companies in the for-profit sector is that teaching employees everything does not work. However, teaching your employees the right thing at the right time does. Attend this informative session and learn how to apply best practices for teaching success in private sector call centers to your public agency.

#### Take-aways:

- White Paper
- Case Studies
- Scoring Templates
- Free 30 Day System Usage

#### Meet the Speaker:

Jerry Feldman founded Westlake Village, Calif.-based CallSource in 1994. CallSource is the leading sales management company in the country and empowers apartment operations professionals for optimum performance.

Prior to CallSource, Feldman founded another company in Southern California, Rentline, an apartment listing/call center that matches calls from prospects seeking apartments with vacancies. CallSource was a spin-off from Rentline in 1988, and continues to operate independently from the CallSource offices.

Before Rentline, Feldman was one of New York City's leading criminal defense attorneys. On the weekends, he owned and operated a 175-acre farm in rural New York where he grew Alfalfa and a variety of other crops. It was during this same time that he successfully developed his first community of for-sale town homes.

#### Benefits of Attending

- Learn how to effectively engage Millennials through teaching and training.
- Understand the keys to individual training in a group environment.
- Tackle individual training in multiple locations.
- Learn how transparency in your courses leads to empowerment and performance from your staff.



### Extended Session – Workshop Part 2

#### Game Changing Moves – Doing Business With Social Media

Joanne McGovern, GSA

**Social Media:** How government is leveraging powerful communication channels to deliver services in exciting new ways.

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#### Take-aways:

- Tip sheet on how to use new media in your contact center
- Matrix of Web 2.0 Technology in Government

#### Meet the Speaker:

Joanne is a Senior Web Content Manager for the U.S. government's web portal, USA.gov, with strengths in information architecture and usability. On Tuesdays she's a blogger for GovGab.gov, where government employees blog about the staggering amount of U.S. government information and services we encounter in our daily lives that can benefit you.

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- See examples of best practices, including government initiatives ranging from blogs to Second Life.
- Get ideas on how to take your first steps into the wide world of social media.
- Learn how to be armed and ready when your agency management and lawyers want to run in fear.



### Tuesday Evening: Join the networking group with Daryl Covey, go to dinner at Union Station and enjoy the Monument Tour or do something memorable.

Leave at 5:00 pm and travel by Metro to Union Station for dinner in the food court.

The monument tour departs Union Station at 6:30 pm returns there around 9:30 pm.

We will return via the Metro about 10:30 pm.

Wednesday 8:00– 8:45

Grand Ballroom



## Mastermind Sessions and Continental Breakfast

*One of the most popular sessions in the event:  
Pick your favorite topic and join in the engaging discussions*

Wednesday 9:00–10:00

Track 1: Lessons on Leadership

Grand Ballroom

Track 1 combined with Track 2

Wednesday 9:00–10:00

Track 2: Business Strategy & Best Practices

Washington Room



### The Link Matters! Satisfaction and Performance Metrics to Optimize Customer Needs

Susan Grow, Federal Consulting Group and Rick Tate, CFI Group

Linking Customer Satisfaction to Contact Center Performance Metrics



Contact centers and help desks place a lot of emphasis, and rightly so, on performance metrics such as average speed of answer, one-call resolution, hold time, etc. However, goals for these are often set based on external “best practices” or prior performance. What really matters is how these performance metrics affects your customers’ satisfaction and future behavior. Most contact centers and help desks also measure satisfaction, but satisfaction measures and performance measures are rarely linked together. The linkage step is vital to ensure that performance measures

are appropriately set to optimize the impact on customer satisfaction. Such understanding allows a more optimal allocation of resources in meeting customer needs (i.e., more efficient utilization of the organization’s resources to meet its objectives).

This session provides an overview of how to make this linkage, as well as real-world examples, of how far off performance targets can be in the absence of making this linkage.

#### Take-aways:

- White Paper: Optimizing Satisfaction From Insights to Actions to Results
- White Paper: 2008 Contact Center Satisfaction Index

#### Meet the Speakers:

**Susan Grow** has extensive experience as a manager of multiple contact centers, program manager for customer satisfaction measurement programs and performance measurement consultant. In addition, she has led the development of strategic plans for a Fortune 100 company. She is currently a federal employee who provides internal performance measurement consulting for federal departments and agencies. Susan’s academic background is in Business Administration and the Measurement of Management Performance.

**Rick Tate** has been a research professional for more than 25 years and is the Lead Senior Consultant at CFI Group for Government and Public clients. He provides oversight for engagements with a number of government agencies to help them optimize their relationship with constituents through employing the scientifically proven ACSI methodology. Dr. Tate’s academic training is in geography, behavioral studies, mathematics and education

#### Benefits of Attending

- See real-world examples of performance metrics set “in a vacuum”.
- Learn how to optimize satisfaction through linking performance metrics with call satisfaction data.
- Hear about the positive financial impact when satisfaction is *optimized* through the linkage of satisfaction data and performance metrics.



### The Dirty Dozen of Common Survey Mistakes

Fred Van Bennekom, Great Brook Consulting

Designing and executing a good, reliable survey

Sound business decisions require good information, and a frequently chosen method to collect this information from customers or employees is through survey research. Surveying is appealing because it seems so simple: you just ask a bunch of questions. However, collecting good, reliable survey information requires that the survey be designed and executed properly. Survey practices, especially questionnaire design, are a minefield where the novice or pro can unwittingly make mistakes resulting in misleading data and bad business decisions.

Using actual survey examples, this presentation will highlight errors commonly made by novices – and by some market researchers. Attendees will leave with a heightened appreciation for the art of survey design and the ability to manage a successful survey project.

#### Take-aways:

- A survey reference guide designed as a checklist for your next survey project.

#### Meet the Speaker:

Fred Van Bennekom founded Great Brook to help service organizations increase their effectiveness by capturing and applying feedback, especially customer feedback. Great Brook develops survey programs for clients and delivers workshops teaching survey research practices based on its founder's book *Customer Surveying: A Guidebook for Service Manager*. Great Brook also performs audits of feedback practices and helps customer support group's voice customer needs into new product development processes to yield higher quality, more supportable products yielding lower Total Cost of Ownership.

Dr. Fred also teaches operations management in the Executive MBA program at Northeastern University and at Babson College. Prior to earning his doctorate, Fred served for a decade as an information systems consultant in Digital Equipment's field service division, architecting operational reporting systems for front-line and senior management.

#### Benefits of Attending

- Gain insights into the concept of successful surveying
- Learn the most common mistakes made in the design of a survey instrument
- Hear common biases introduced from poor question design and construction
- Learn how to create a good and reliable survey



### Learn to Create Ideas that Maximize Success and Energize the Workforce

Yolunda Davis, IRS

Energizing the Workforce - Creativity is for EVERYONE...Two Simple Ideas to Bring Great Success

Have you ever had a desire to be more creative in your approach to subjects like change management and managing multiple priorities? Have you desired to move employees past the vision statement toward actual work performance? If your answer is yes, this session is for you! We will explore how a simple concept like "leaves" was used to energize employees through the change process.

In addition, we will also look at how a simple contest was used to move employees from the conceptual stage to become stakeholders in a new process. You can be more creative in your work group to reinvent or reenergize old ideas to bring about positive results for the customers and the employees. You will never look at a leaf quite the same.

#### Take-aways:

- Each participant will receive a handout on "Creativity Made Easy," which will serve as a guide for developing future ideas.

#### Meet the Speaker:

Yolunda Davis began her IRS career more than twenty-seven years ago as a co-op student. She has transversed through a variety of administrative support positions in Facilities Management, Personnel, Training and Quality. She has over seventeen years of experience as a Management Analyst and has extensive experience in management. She has been a part of the IRS Employee Resource Center from its inception in October 2001 where she served as a Senior Program Analyst for seven years. In September 2008, she was selected as the Associate Director of the Employee Resource. Yolunda holds a Bachelor of Science Degree from the University of Alabama and is an accomplished motivational speaker. She is a respected member of the Customer Service community, currently serving on the Board of the National Government Customer Support Conference organization.

#### Benefits of Attending

- Learn how to take ordinary concepts and give new life to inspire the workforce.
- Learn how to use the current culture to grow innovative solutions to complex issues,



*Leaves to energize employees?*

*Yolunda will share this idea and may others to energize and maximize the workforce.*



### Case Study: Taking a Centralized Approach to Service Management: Cultivating Greatness and Success

Dee Clark & Debra Siler, Environmental Protection Agency

Like many federal government agencies, EPA faced the problem of separate and disparate help desks, support structures, and hotlines. To meet this challenge, the EPA Call Center conceptualized, consolidated, and centralized a SPOC (Single-Point-Of-Contact) solution that would meet the needs of 18,000 agency staff, as well as universities and the public. The EPA Call Center employs ITIL best practices, utilizing multi-contact channels, and doing “whatever it takes” to meet the needs of our customers.

This is evidenced in their exceptional SLAs:

- 90% first contact resolution rate
- 99.99% availability rate
- 1.7% call abandon rate
- 97% first call response in less than 30-seconds

#### Take-aways:

- Most Valuable Player Template
- eGain White Paper: 7 Habits of Highly Effective Contact Centers and Help Desks

#### Meet the Speakers:

**Dee Clark** has been involved with the award winning EPA Call Center since its inception in 2002. Dee is the customer liaison and technical point of contact between the EPA Program Offices and Regions, the EPA Working Capital Fund, and the contractor. Dee has over 21 years of public service in the federal government and has been at EPA for 16 years, the past 10 of which have been with EPA’s CIO organization.

**Debra Siler** is an award winning Service Desk Director with 16 years of experience in Service Desk requirements analysis, design, implementation, and re-engineering. She has built several 24x7 global SPOCs, and re-engineered numerous regional support organizations within stringent time constraints and under budget. The last five (5) years have been dedicated to the enhancement of the EPA Call Center and the development of Apptis’ Service Desk Practice.

## Overall Excellence Award Winner 2008



### Case Study: How to Develop and Deliver a Successful Disaster Recovery and Business Continuity Plan

Corina Stretch, Puget Sound Energy

Every business and organization can experience a serious incident, which can prevent it from continuing normal operations. This can happen any day at any time. The potential causes are many and varied: flood, explosion, computer malfunction, accident, pandemic flu, the list is endless. The information you will learn in this session is designed to help you plan for these scenarios. It will help you reduce both the risk and impact should the worst occur. Be sure to join Corina in this case study presentation as she takes you through the Puget Sound Energy’s customer services proven disaster recovery and business continuity plan.

#### Take-aways:

- Handout of Puget Sound Energy’s Bothell Emergency Center’s Disaster Recovery and Business continuity plan
- Best practices from other resources

#### Meet the Speaker:

Corina Stretch brings over 20 years experience in the customer service department with Puget Sound Energy. Puget Sound Energy (PSE) serves more than 1.7 million electric and natural gas customers. This is Washington State’s oldest and largest energy utility, with a 6,000-square-mile service territory stretching across 11 counties. As a front-line supervisor, outage manager, trainer and support business analyst, she plays a key role in the 200+ seat department’s disaster recovery and business continuity planning as well as overseas daily business operations. Corina will engage you in a lively discussion and provide worthwhile information that you’ll not want to miss.

#### Benefits of Attending

- Learn best practices used to motivate and retain Call Center employees.
- Hear how the EPA’s Call Center used SPOC to meet daily challenges and provide exceptional support to a diverse customer community.
- Understand the consolidation process and how to support customers in an ever-changing environment.
- Learn methods of collaborating to build a stronger team and increase ROI.
- Discover new ways to support the “unsupported” questions using multi-contact channels and doing “whatever it takes”.

#### Benefits of Attending

- Discuss and understand the basics and why it’s important to have a plan during a serious incident
- Learn how to create and develop a successful disaster recovery plan for your department
- Improve communication to help avoid the chaos when a serious incident occurs
- Discuss the importance of holding mock events or drills
- Hear the successes and lessons learned



### **The Importance of Timely Communication: Using Social Media for Emergency Preparedness and Information Sharing**

Darrell Darnell, Director of the DC Homeland Security and Emergency Management

Times are constantly evolving. Therefore, the way we communicate with our constituents must also evolve. A major challenge in Homeland Security and Emergency Management is getting key messages out to the general population in a timely manner.

Realizing this challenge, my agency turned to social media outlets such as, Facebook, Twitter, blogs and list-servs to communicate with a segment of the population that we were previously missing.

#### **You will Learn:**

- Learn the benefit of social media/networking
- Identify the media outlet for your target audience
- Learn about social networking for communication, preparedness and information sharing
- Increase knowledge of new trends

#### **Meet the Speaker:**

Mr. Darnell is the Director of the District of Columbia Homeland Security and Emergency Management Agency (HSEMA). As Director he is responsible for carrying out the agency's mission to reduce the loss of life and property and protect citizens and institutions from all hazards by operating and maintaining a comprehensive all-hazard community-based, state-of-the-art emergency management infrastructure, including coordination and management of the District's response to emergencies and disasters of all kinds, both natural and man-made.

Mr. Darnell served honorably as a member of the United States Air Force (USAF), retiring November 1, 1997.

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### **Wednesday 12:30 – 1:00: Closing Keynote Discussion**

**Grand Ballroom**

Interactive summary of lessons learned, ah-ha moments, and educational tips and tricks from this week's sessions.

**Final take-aways and valuable giveaways, including a drawing for free passes to attend  
The 11<sup>th</sup> Annual Signature Customer Service and Support Conference and Expo 2009 in Seattle, WA**

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### **Wednesday 2:00 – 4:00: USPTO Call Center Site Tour**

Meet in the hotel lobby at 1:30 or meet at the lobby of the USPTO at 1:45. The tour starts at 2:00 and goes until around 4:00. You **MUST** be a registered attendee of the GCS conference to participate on this tour.



### **Wednesday Evening: Dinner Cruise on the Potomac**

following the USPTO Call Center Site Tour

Leave at 6:00 pm and board the dinner cruise at the foot of King Street.

The food is great and the sunset scenery on the Potomac is magnificent.

We will arrive back by 10:30 pm.



## **The 11<sup>th</sup> Annual *Signature* Customer Service and Support Professionals Conference**

Date: **September 14-15, 2009**

City/State: **Seattle, Washington**

Location: ***Museum of Flight***

**Limited to ONLY 125 attendees! Reserve your seat today.**

Stop by the registration desk and make sure you are on the list. You can pay by June 15<sup>th</sup>, 2009 but you must be on the list to be guaranteed a seat and qualify for the early, early bird discount.

[www.helpdeskconference.com](http://www.helpdeskconference.com)

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### **High Tech High Touch Solutions invites you to join *The Customer Service and Support Professionals (CSSP) Community.***

Complimentary meetings, free tele-seminars, free and or low cost workshops, CSSP Virtual Interest Groups™ (CSSPVIG™), and a global network of people and online resources. It is either FREE (mostly) or low cost – we are the only group like this in the United States. An expert board of individuals from the contact center and help desk industry runs the CSSP, owned by HTHTS.

**Drop your card at the registration desk to be added to the secure database, which is separate from HTHTS' primary database, or sign up on the website.**

[www.thecssp.com](http://www.thecssp.com)

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### **Websites containing resources, event listings, tele-seminars, newsletters and more**

[www.hthts.com](http://www.hthts.com) – High Tech High Touch Solutions official website

[www.thecssp.com](http://www.thecssp.com) – For Contact Centers and Help Desks - Community of Practice

[www.ivymeadors.com](http://www.ivymeadors.com) – Ivy Meadors' official website

### **Contact information**

Email: [solutions4u@hthts.com](mailto:solutions4u@hthts.com) or [cssp@hthts.com](mailto:cssp@hthts.com)

Call us any time at: 425-398-9292

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