

JANUARY: Culture & Morale

Let's kick off the New Year by getting our contact center employees excited about upcoming initiatives and the goals of 2013. A vibrant culture and strong morale will help set your center up for success all year long.

1. A High-Performance Culture

- What is a high-performance culture and what is the impact on CSAT?
- How to set expectations of your contact center for your customer AND the agents
- Knowing when to change course on a performance management program
- Strategies for driving results and improving morale
- What happens when performance management programs backfire?
- How to performance manage and not kill the culture
- Overcoming the challenge that not everyone is motivated in the same way
- What is the best way to see if your customers like your culture?
- Happy customers = happy agents

2. The Role of Leadership

- Building Leaders in the Contact Center
- Managing Change in the Contact Center

3. Incentive Programs

- How to sell your CFO that you need a morale budget
- What does an effective incentive program look like?
- Measuring the before & after effects on your culture
- Scheduling incentives into your workforce planning
- Measuring incentive programs and their ROI
- Behavior challenges that arise from the wrong incentives
- Recognizing, rather than incenting great performance
- Surveying your agents

4. Partnering for Success

- How to get the rest of the company involved in the culture of the contact center
- What metrics and data should WFO share to show culture impact?
- How to schedule in the culture of the company when it competes with KPIs
- Using outside resources and vendors to amp up the culture
- Using volunteer and charity organizations as culture/morale activities

5. Culture-in-Action

- What would you do with \$10/agent? \$50/agent? \$100/agent?
- Video of real-life centers in action
- What's your center's culture?
- Where you an ICMI contact center of the year award winner or finalist? Where are you now?

FEBRUARY: Social Media Support

Social Media Support is a controversial subject in many contact centers. Our intention is to help small and large centers alike figure out the optimal way to support social.

1. The Reality of Social and Customer Service

- The reality is it's hard, there isn't a ton of volume, yet it needs to be addressed
- Talk about the latest facts and figures and why most contact centers need to consider it
- Have you tried supporting social? Did it backfire? Why?
- What is your expert opinion on where social support is headed?
- What's the reality for your particular industry and customer?

2. Setting your "Social Center" up for Success

- How to move the ownership from marketing to customer support
- What to do when the CEO tweets back to customers
- How to schedule social into your already busy contact center
- Setting social customer expectations
- Training tips for the social agent
- Setting up Twitter, Facebook, LinkedIn and Pinterest in your contact center
- Monitoring tools for your social stream

3. Optimizing Social Media in Your Contact Center

- Growth and profit expectations from social media
- The ROI of connecting customers through social to your brand and customer service
- How to identify the customer in the channel they want to be in and solve their problem
- Adapting the new social processes
- Connecting employees through social – IM, Chatter, internal communities, FB
- Can you optimize your current technologies or do you need to invest in new?

4. The Secrets to Supporting Social

- What makes a great social agent?
- Who is this new agent? How did you staff and train?
- How can you authorize adoption of social media sites like Facebook and Twitter within your contact center for service, but not for "socializing"? How are you monitoring?
- Have you experimented with new and creative social service initiatives like Tweetups that have reduced some of your contact center volume or traffic to self-service?

MARCH: Metrics that Matter

One of the secrets to contact center success is managing to the metrics. The challenge though, is determining what the necessary metrics are that you should track, measure and report. And once you know the “what”, you need to determine the how, the when, the who, and the why.

1. Back to the Basics

- The importance of a solid call management reporting software
- Reporting on the contact center without all the bells and whistles
- What are the 5 most important metrics a contact center should track and measure?
- Metric of the Day! Pick your favorite basic metric that defines your contact center or your management style, and tell us about it
- Demonstrate how you and your center use Brad Cleveland’s [Call Center Management on Fast Forward](#)
- Can you manage through canned metrics and reports?

2. Sharing in the Success

- Metric of the Day! What metric is vital to your contact center that sets you apart from the norm? Are you tracking something unique for one of your business partners – finance, technology, or marketing?
- Agent Scorecards
- Using dashboards and digital signage
- What do you share with the rest of the organization? How do you report on the success of the team?

3. Beyond the Basics

- The challenge of choosing the right combination of metrics
- Metric of the Day! What non-phone metric is key to your contact center’s success? What new performance indicators are necessary when supporting email, chat AND phone?
- Here’s your chance to show off a little. Tell us and the community how your metrics have set the pace for your center. Wow us with your multi-channel volume, your performance, and your customer satisfaction
- Do the standard metrics of service level, response time and abandonment rate apply to chat? What about chats missed, refused, average concurrent chats or average lines to answer?
- The importance of utilization and occupancy in the multi-channel environment
- Managing to organizational metrics that conflict with the contact center’s vision or agent morale

4. What’s Next on the Dashboard?

- Metric of the Day! What’s next to pop up on your dashboards? What metric have you seen or heard about that you’d like to start tracking and reporting?
- Incorporating the new channel metrics of mobile and social into your standard KPIs
- Have you cracked the code on aligning people and metrics? How do you report and show that alignment and keep agents inspired?

APRIL: Workforce Optimization

Proper scheduling and forecasting continue to be a challenge for many contact centers. Even when you do get them perfected, they are only part of the WFM equation. We'll show how workforce optimization positively impacts both the contact center and the company.

1. Turning WFM into WFO

- The Right People, in the Right Place, at the Right Time
- Costs and Causes of Attrition
- Getting Finance and the C-level to understand the business case for a true WFO program and how it can benefit the entire organization, not just the contact center
- How the contact center, IT, and other department executives can share information, work together, and deliver a more cost-effective solution and experience
- The information and metrics your contact center should deliver to other areas of the organization
- The tricks to sharing the total cost of ownership - the ROI secret behind workforce optimization
- The advantages of cloud versus premise-based solutions

2. Forecasting for the Future

- Cycle planning for more accurate forecasting
- Strategies for handling calls during seasonal peak volume
- Forecasting tools that work for any size center

3. An Inside Look at the Annual SWPP Conference

- Planning to attend the Society of Workforce Planning Professionals annual conference? The community would love to hear what goes on, and what is on the horizon for WFM
- Discuss the importance of groups like SWPP and the benefits of membership

4. Managing Multi-Channels

- Chat, social, mobile, email, and phone all have different needs and scheduling challenges. How is your center managing the multi-channel environment?
- Adding non-voice channels into your mix
- Determining which agents are right for which channels and when to offer them
- Workload distributions ideas

5. Different Models that Work

- Examples of how the “command center” is set up in your organization – personnel, team size, ratio to agents, backgrounds and education
- How do you communicate your real-time needs back out to the front-line agents? What tools are imperative for this communication?
- Have you experimented with hourly versus salary? Exempt and non-exempt? Full-time versus part-time? Flexible shifts and flex hours? What works and what hasn't in your contact center
- Performance-based scheduling models to drive agent behavior and the best customer experience

MAY: Managing Mobile

Smartphones are the fastest growing segment of the mobile industry. Today's consumers have access from their mobile devices anytime and anywhere. We want to help our community get prepared to take on mobile support...successfully!

1. Is ANYONE Actually Providing Mobile Support?

- Statistics show that our customers are using their mobile devices for shopping, research, and self-service, but what are the contact centers doing to support them?
- Is it necessary to offer live support or are self-service options adequate?
- State of the industry and an interpretation of the results from the Voxeo Mobile Customer Service Strategy of 2012
- What your competitors and other industries are doing
- So what are you doing to support your mobile customers? Is your contact center ready to take on this support channel?

2. What Does a Mobile Support Strategy Look Like?

- Do you even know where to start with a Mobile Customer Service Strategy?
- How should the traditional contact center be retooled?
- How to gain executive buyoff for a Mobile Customer Service Strategy and demonstrate the ROI
- Why Mobile should become a supported customer service channel in your contact center
- How to prepare your agents and your customers to ensure great customer satisfaction across all channels
- Mobile customer engagement has a significant ROI for many industries. Are you one of them?
- Many companies are struggling with determining a true budget and future costs of mobile support

3. A Customer Service Announcement: A Recap of ACCE 2013 – Seattle

- ACCE is the premier contact center event of the year! Tell us about what you loved, what you heard, who you spoke to
- What did you come out of ACCE with that you will be implementing in your centers tomorrow, next quarter or putting on the roadmap for next year
- Provide non-attendees a snapshot of what they missed, and give them insight into proving the ROI for next year!

4. The Device has Caught up with the Desire – A Focus on Technology

- Is it possible to optimize current technologies to support mobile customers or does one need to make significant investments
- What are the new advances in mobile technology? How will that affect you in the contact center?
- Case studies and spotlights on technology vendors and providers that have innovative solutions

JUNE: All about the Agent

For most call centers, agent workforce is the largest budget item. According to much of our community, the cost to hire a new agent can be high. Let's talk about the best ways to attract, retain, and engage our most important assets.

1. Recruiting and Retaining the Best Talent

- Conducting pre-hire assessments, personality tests, and other unique hiring techniques
- A snapshot of the different generations of contact center agents
- The difference between a sales and a service agent
- Keeping agents engaged: from content to activities
- Do you see differences in the recruitment and retention of agents based on geographic regions? How so, and what have you done to mitigate?
- The importance of vision and values in the recruiting and retention process
- Managing to the "middle"

2. Partnering for Success – HR, Training, WFM, Technology

- Why Agents aren't in their Seats
- Tools to improve agent satisfaction
- Nuances within the small contact center
- Technology that hinders and technology that helps
- The importance of a career development program
- Having your corporate partners participate in agent focus groups and roundtables
- Agent certifications, in-company internship programs and other creative ways to keep great agents engaged

3. Are Virtual Agents the Agents-of-the-Future?

- Why Use At-Home Agents?
- How to set-up a virtual at-home agent program from scratch
- Challenges of Remote teams
- Managing a Virtual team
- The tools and software needed to set remote agents up for success – knowledge management, instant messaging, social media
- Creating alignment with Headquarters
- Using technology for monitoring

4. Tales from the Frontlines

- Did you have an agent(s) that was a finalist or winner for Spirit of Service last year? Where are they now? What was it like to win? What made them award-worthy?
- What works and what doesn't from an agent's perspective?
- If you could give your customers candid advice on how to get the best service from your company or contact center, what would you say to them? Here's your chance to give them anonymous, yet valuable insight on being the BEST CUSTOMER

JULY: Global Service Delivery

Our customers are in every time zone, our contact centers are bursting at the seams, and we need to support multiple languages across many products. We will explain some strategies to overcome these challenges and give the community the options around build versus buy, outsource versus captive, and offshore versus nearshore. It's all about the goals of the company and the expectations of the customer.

1. When Your Customers Become Global

- How do you train your agents on cultures around the world?
- What do you do about the language barrier?
- When does it make more sense for customers to be serviced in-country?

2. Creating your OWN Captive Out-of-Country Contact Center

- The challenges and benefits of the build-or-buy strategy
- Managing across cultures and languages
- Technology tools to assist with accents and grammar
- How to train another culture on the nuances of the US customer
- What does a project plan for an implementation like this entail?
- Partnering for success
- How to build a contact center from the ground up
- What are the models of success to model after?

3. Is Outsourcing to a Business Process Outsourcer (BPO) Right For You?

- Creating an RFP – samples of RFIs and RFPs and the difference
- Site and Vendor selection
- What the heck is an SOW? A QBR? What are they and why do I need them?
- What to expect 90 days into a contract with a BPO
- Outsourcing horror and success stories – learning from those who have been there and done that
- Setting expectations and dealing with the negative after-effects of the US-customer reaction

4. Geographic Spotlights

- We'd love to highlight the ins-and-outs of countries that are currently popular within the contact center industry – the Philippines, India, Ireland, Costa Rica, Czech Republic – what should someone expect when going there for the first time?
- Have you visited or considered an emerging country for contact center work? Vietnam, El Salvador, Guatemala, South Africa, Romania are popping up on the map as possibilities
- Is nearshore better than offshore? What are the benefits and challenges of staying near the US for contact center work?

5. Contact Centers Around the Globe

- Do you have a center that is working great? Let's highlight it!
- When you were sourcing, are there centers that you would like to talk about, even if you didn't select them?
- What's it like to be an expat in the Philippines? A frontline agent for US customers in India? A vendor manager for a site in Costa Rica? If you have a personal story, we'd love to hear about it!

AUGUST: Secrets to Self-Service

Organizations that leverage self-service options and manage them effectively, can improve speed to resolution, decrease costs, and create a more consistent customer experience. Self-service is becoming increasingly important as customers expect 24x7 service in any language, for any product, and on any topic. In fact, some customers prefer it.

1. How to Increase Adoption of Self-Service

- Automation Strategies for enhancing customer service – IVR and online
- Tips to avoid the perception that customers are going to get stranded in your IVR or online help system
- Who are the customers that prefer self-service and how to get them to endorse it
- Can self-service be taught to customers? Can agents effectively introduce customers to self-help options without sounding like they are pushing them off?
- Using innovative proactive solutions (automated chat, pop-ups, automatic surveys) to drive customers to self-service
- Balancing the cost benefits of self-service with the support customer's really want

2. Technology Solutions Both Inside and Out

- CRM that improves call center results and efficiency
- Integrating your help system, ticketing, and knowledgebase into a customer self-service portal
- The roadmap for a successful self-service roll-out
- New advancements into self-service for mobile and social customers

3. Measuring Success

- Describe the structure you need and the metrics you should report on to prove success
- A great self-service portal or knowledgebase is often described as a learning tool that deflects a customer's need to interact through other channels. What else can it do?
- Demonstrate how your organization gained a competitive advantage through self-service initiatives that reduced AHT and increased FCR

4. Self-Service from the Inside

- The importance of knowledge management systems for the agent experience
- Are agents better trained using LMS or other self-service systems?
- How to efficiently create and maintain quality, easy-to-find content in the knowledge base
- Ways to motivate agents to use the knowledge base and effectively assess individual and team contributions
- How to articulate the value of knowledge management practices for your organization
- Strategy for sustainable success that minimizes investments in knowledge workflow and maximizes return
- How to capture, structure, and reuse knowledge within the call handling process

SEPTEMBER: Transformational Customer Relationships

While customer satisfaction continues to be a key business driver, companies constantly need to define new, innovative methods for improving and reporting on the customer experience. They also need to know what is truly important to their customers and how to ensure that all company goals and agent initiatives support them.

1. Creating a Voice of the Customer (VOC) Program

- What does a true VOC program entail?
- Why does knowing the customer really matter?
- Building a single view of the customer
- The benefits and challenges of incorporating a “Mystery or Secret Shopper” component
- Creating a cross-department/cross-functional Customer Loyalty Team (CLT)
- What books have you read that have really helped you set your VOC program?

2. What Truly Matters to the Customer?

- When is customer service still considered a differentiator?
- The customer is changing and becoming more educated and knowledgeable in many industries. How has that impacted the VOC program?
- Identifying the 5 key things that matter to the customer regardless of industry
- Do customers have different expectations and desires based on the channel they request support through? How to best approach and satisfy through mobile, social, chat, email, self, or phone
- Should you STOP trying to delight your customers?
- Enhancing Customer Loyalty by providing value-added services

3. Looking Beyond the Survey

- Does a CSAT survey really matter?
- How to expose CSAT to the rest of the organization
- Integrating CSAT and NPS
- What does a GREAT CSAT survey really look like? How to ensure customers are willing to fill it out, and filling it out correctly?
- What are the right tools to track CSAT?

4. Managing the Customer Experience

- The Role of Quality and Coaching (We will touch more on this in the next month!)
- Coaching the coaches
- Using Speech Analytics to improve the customer experience
- Turning around unhappy customers
- Managing the emotions that impact the customer experience
- Using the CLT to improve the customer experience and assist in setting CSAT goals for the contact center
- Are you corporate vision, mission and goals supporting your customer experience? How are you managing that internally and back out to the customer?
- Linking Customer Loyalty and Employee Engagement

OCTOBER: Continuous Learning & Development

Engaged employees clearly focus on the customer experience and help fulfill the company mission and values. Training and a solid Quality Assurance program ensure that everyone is continuously learning and growing into the employees you need today...and in the future.

1. What's New from the Annual QATC Conference in Nashville

- Will you be attending the Quality Assurance and Training Connection's annual conference in Nashville? We'd love to hear what went on in the fields of QA and Training, from the people that live and breathe these initiatives every day
- Tell the community why membership into the QATC is valuable and why groups like this felt set the standards for great service

2. It's Customer Service Week!

- Show off your contact center and how you celebrate Customer Service Week
- Share your low-cost ways of agent engagement and daily activities
- What inventive morale-boosting initiatives do you have in your center EVERY WEEK of the year?

3. A Tutorial on Training

- Justifying the need and ROI for classroom training
- The technology and tools of the Learning Management System (LMS)
- Management and leadership training for succession planning
- Training to the culture you want
- How do you train tenured agents on new techniques and channels?
- The importance of instructional design in call center curriculum
- Gamification techniques and other innovations in agent training
- Certification programs that keep your agents engaged and your managers learning
- Methods and training to spin up a "new supervisor". How certifications and formal training programs can make the transition from agent to supervisor seamless

4. Quality Assurance and Agent Monitoring

- Is the old QA methodology dead?
- How are speech analytic tools and call recordings changing agent behavior?
- Outline a great QA program and demonstrate examples of quality monitoring forms
- What's the best way to QA and monitor remote or virtual agents?
- Demonstrate how QA and Agent Monitoring offer up great opportunities to try new things
- How do you monitor without the fancy technology and call recording software?
- Show how you've integrated CSAT and QA into agent scorecards
- Transforming Quality Monitoring to focus on coaching and development

5. A Customer Service Announcement: Call Center Demo 2013

- We love to showcase and spotlight our exceptional speakers and presenters from CCDemo. Interview your favorite, or write about something new that you saw or heard during this great conference

NOVEMBER: Preparing for the Year Ahead - What's Next?

Each year brings new challenges and new exciting priorities for the contact center. Get a jump ahead as we explore new processes and technologies to enhancing the customer experience, improving employee performance, and delivering exceptional results.

1. How to Get the Buy-in You Need for New Ideas

- How to get channels like Mobile and Social into your budget
- Definitions and terms you need to know to influence your CFO
- Tips for doing more with less
- The importance of a Customer Access Strategy and annual planning

2. Creating our Agent of Tomorrow

- Is the agent of tomorrow expected to handle ALL channels?
- Should our agents be a blend of sales AND service? Does that change the hiring and profile and the training need?
- Training an uncomfortable agent to handle a new channel
- Social and mobile aren't necessarily common tools for all generations. We need to alter the training, performance management and expectations for these agents if we want to retain them
- Does an agent's age and geographic region matter? Does it change the way we need to train and performance manage?
- Gamification techniques for the new millennials

3. The Customer of 2014

- Customers are getting more knowledgeable and more perceptive. The contact center needs to use that to their advantage
- With the heavier adoption of mobile and social, will customers actually start utilizing self-service channels more?
- How are the next generations of customers impacting your channel distribution?
- Does a customer's age and geographic region matter? Does it change their expectations and thoughts around CSAT?

4. What Will our Phones Do?

- What new Technology will you need in the next 5 years to remain competitive?
- The role of video in troubleshooting and customer service
- Chat is still the fastest growing channel of adoption in many centers. Explain the impact and the challenges
- Highlight of innovative contact centers that are reducing call volume and improving CSAT

DECEMBER: Our Gift to You - Solutions to the BIG Questions of 2013

We will wrap up the year by answering the important questions of 2013 and providing solutions for our community to implement into their own contact centers. Stay tuned throughout the year as we identify the BIG challenges within the industry.