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Call Center VoC Experts

OFFICIAL AWARDS GUIDE | 2011



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Here is a complete listing of all the SQM Award winners & finalists for 2011 including Call Center of the Year, Call Center World Class Call Certification, Customer Satisfaction/FCR Awards, Employee Satisfaction Awards, CSR Finalists for CSR of the Year, and Supervisor Finalists for Supervisor of the Year.

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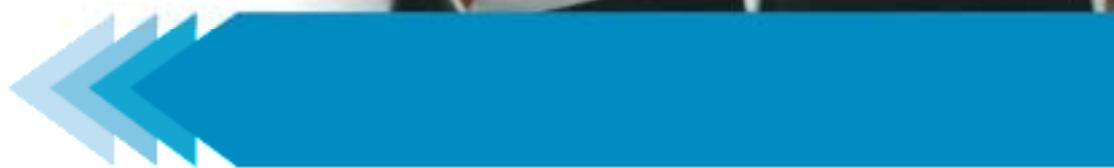
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Letter from SQM's President & Founder

SQM's 13th Annual Most Prestigious North American Call Center Industry 2011 Awards for Service Quality Excellence Program

SQM is pleased to announce our 2011 award winning call centers and frontline employees. This is SQM's 13th Annual Most Prestigious North American Call Center Industry 2011 Awards for Service Quality Excellence.

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

At this year's awards ceremony, we will recognize 32 organizations with 39 different awards including Call Center of the Year, World Class Certification, First Call Resolution (FCR) Improvement, Highest Employee Satisfaction (Esat) and Highest Customer Satisfaction (Csat).

This year, we will recognize the Top 11 World Class CSRs Finalists who are the "best of the best" Certified World Class CSRs, and of those 11 CSRs, we will announce the 2011 CSR of the Year. The

CSR of the Year will be given \$500 in cash at the awards ceremony. SQM will also recognize the Top 10 World Class Call CSR Improvement Winners for 2011.

Also, we will be recognizing the Top 6 World Class Supervisors who are the "best of the best" Certified World Class Supervisors, and of those 6 Supervisors, we will announce the 2011 Supervisor of the Year. The Supervisor of the Year will also be given \$500 in cash at the awards ceremony. We believe that Supervisors are a key ingredient to creating World Class FCR, Esat and Csats call center performance.

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

Sincerely,



Mike Desmarais

President & Founder | SQM Group

AWARDS

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CALL CENTER FINALISTS FOR CALL CENTER OF THE YEAR

ORGANIZATION

Canadian Tire Financial Services (CRCC)
Scotiabank (Nova Scotia)
VSP Vision Care (California)

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

CALL CENTER WORLD CLASS CALL CERTIFICATION

ORGANIZATION

Blue Cross Blue Shield of Kansas
Brother Canada
Canadian Tire Financial Services (RA)
D+H Ltd. (Ontario & Quebec)
Insurance Corporation of BC (Claims & DTVI Division)
Jackson (Michigan)
Marriott Systems Support Center (Maryland)

Marriott One Yield
Rogers Enterprise Service Delivery
Scotiabank (Alberta & Nova Scotia)
Scotiabank International (Dominican Republic)
Vancity
VSP Vision Care (California & Ohio)

Criteria used for Call Center World Class Call Certification are 75% or higher of the calls are at the world class level for 6 months or more in 2011. SQM's world class call criteria are based on the customer's call being resolved, the customer is overall very satisfied (top box response) rating with their call center experience and the customer service representative.

CUSTOMER SATISFACTION /FCR AWARDS

ORGANIZATION

AWARD

HIGHEST CUSTOMER SATISFACTION FOR THE CALL CENTER INDUSTRY AWARDS

The Schwan Food Company
TD Canada Trust
Arizona Public Service

1. Best Selling Customer Satisfaction
2. Highest IVR Customer Satisfaction Self Serve
3. Highest IVR Navigation to the Right CSR

*1. This award recognizes the call center with the highest customer satisfaction (top box response) rating for selling approach
2. This award recognizes the call center with the highest overall customer satisfaction (top box response) rating for a self serve IVR
3. This award recognizes the call center with the highest IVR navigation to the right CSR the first time.*

HIGHEST CUSTOMER SATISFACTION BY INDUSTRY AWARDS

TD Bank, America's Most Convenient Bank
Jackson
Amex Canada Inc.
VSP Vision Care
Blue Cross Blue Shield of Kansas
Seton and Emedco
Enmax Encompass
Cogeco
Insurance Corporation of BC (Claims Division)
Marriott Systems Support Center
211 Ontario
VSP Vision Care
Allegra Direct Communications Inc

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

Criteria used for highest customer satisfaction for each specific industry/sector are based on having the highest world class call rating for an organization.

FCR IMPROVEMENT AWARDS

Blue Cross and Blue Shield of Nebraska
BlueCross BlueShield of North Carolina
BlueCross BlueShield of South Carolina (National Alliance)
Blue Shield of California
CareFirst BlueCross BlueShield
Enmax Encompass

Fido Mobile (OLS)
GMAC Mortgage
Horizon Blue Cross Blue Shield of New Jersey
Marriott Systems Support Center (Unisys)
Scotiabank International (Dominican Republic)

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

AWARDS

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EMPLOYEE SATISFACTION AWARDS

ORGANIZATION

Canadian Tire Financial Services (CRCC)

Criteria used for highest employee satisfaction for the call center industry are based on having the highest employee overall very satisfied (top box response) rating with working in their call center.

Canadian Tire Financial Services (CRCC)	Financial
Insurance Corporation of BC (Claims Division)	Insurance
Arizona Public Service	Energy
Telus Sourcing Solutions	Outsourcer

Criteria used for highest employee satisfaction for each specific industry are based on having the highest employee overall very satisfied (top box response) rating with working in their call center

Canadian Tire Financial Services (CRCC)

Criteria are based on highest Esat improvement from previous year.

Criteria are based on 45% or higher of employees rate their overall experience of working in the call center as very satisfied (top box response) rating.

Arizona Public Service
Canadian Tire Financial Services (CRCC)
Insurance Corporation of BC (Claims Division)
Jackson
Scotiabank (Nova Scotia)
Telus Sourcing Solutions

HIGHEST EMPLOYEE SATISFACTION FOR THE CALL CENTER INDUSTRY AWARD

HIGHEST EMPLOYEE SATISFACTION BY INDUSTRY AWARDS

MOST IMPROVED EMPLOYEE SATISFACTION

WORLD CLASS EMPLOYEE SATISFACTION AWARDS

CSR FINALISTS FOR CSR OF THE YEAR

EMPLOYEE

ORGANIZATION

Robert Salisbury	Blue Cross of Idaho
Barnney Sandoval	Blue Cross Blue Shield of Vermont
Sam Wong	Brother Canada
Blaise D'Mello	LoyaltyOne
Samina Rifat	LoyaltyOne
Danny Sipchand	Rogers Enterprise Service Delivery
Gordon Ryan	Scotiabank
Mally Metlege	Scotiabank
Tricia Hann	Scotiabank
Valerie Dibowski	Sun Life Financial
Kim Ostry	VSP Vision Care

To be eligible the customer representative must be a World Class Certified customer representative. The criteria for a Certified World Class representative is 75 percent or higher of the calls surveyed are at the world class level. Call center management must send an example of a great customer service story that a CSR delivered.

SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

EMPLOYEE

ORGANIZATION

Donald Wynant	Blue Shield of California
Sandra Wilson	Horizon Blue Cross Blue Shield of New Jersey
Nancy Chia	Insurance Corporation of BC
Deborah Aiple	Insurance Corporation of BC
Albany Gamero	LoyaltyOne
Lisa Jones	Sun Life Financial

To be eligible the supervisor must be a World Class Certified supervisor. The criteria for a World Class supervisor is 75 percent or higher of the calls surveyed are at the world class call level. Call center management must also send an example of a Csat CSR coaching story.



SQM ANNOUNCES OUR 13TH ANNUAL MOST PRESTIGIOUS NORTH AMERICAN CALL CENTER SERVICE QUALITY AWARD OF EXCELLENCE WINNERS FOR 2011

JUDGED BY CUSTOMERS WHO CALLED A CALL CENTER AND EMPLOYEES WHO WORK IN A CALL CENTER

SQM benchmarks over 450 leading international call centers on an annual basis and has been conducting first call resolution (FCR), employee satisfaction (Esat) benchmarking and customer satisfaction (Csat) benchmarking studies since 1996. On an annual basis, SQM conducts over 1 million surveys (over 450,000 live surveys and over 550,000 IVR surveys) with customers who have used a call center, email, website or IVR contact channel service. SQM also conducts over 25,000 surveys yearly with employees who work in call centers. Our customer and employee survey database is one of the largest in North America. SQM does business in 11 countries around the globe: Canada, United States, Argentina, Australia, Puerto Rico, India, Philippines, Costa Rica, Mexico, Dominican Republic and Jamaica. Based on the call center benchmarking studies, SQM awards excellence in customer and employee satisfaction for the call center industry. It has recognized top performing call centers for customer and employee satisfaction since 1998. SQM awards are based on customers who have used a call center and employees who work in a call center and are considered to be the fairest and most prestigious call center awards in the call center industry. SQM conducted the benchmarking studies for the period of October 1, 2010 to September 30, 2011.

For each call center that participated in the customer benchmarking study, SQM completed 400 post-call phone surveys, conducted by SQM's telephone survey representatives. A sample size of 400 surveys provides a margin of error +/- five percent with a confidence level of 95 percent. All customer post-call phone surveys have approximately 12 or more questions and take

approximately four to five minutes to complete. The surveys were conducted within two business days of the customers' calls to the call center in order to understand their satisfaction with their call center experience. SQM uses an in-depth post-call customer survey approach that consists of both rating questions and follow-up customer feedback questions that can be used to help the call centers improve their FCR and Csat performance.

In addition, for each call center that participated in the employee benchmarking study, SQM completed a minimum of 100 customer service representative (CSR) surveys or if the call center had less than 100 CSRs, 90 percent of the CSR workforce completed surveys. All employee surveys had 50 or more questions and were conducted online at the CSR and supervisor levels. This confidential employee online survey took approximately 30 minutes to complete. SQM uses an in-depth, online employee survey approach that consists of both rating questions and follow-up employee feedback questions. The employee survey focuses on the call center's FCR, Esat and Csat performance from a CSR and supervisor perspective and provides opportunities to improve the call center's FCR performance in terms of people, process and technology practices. SQM has 39 different awards that recognize the top performing call centers. These prestigious Call Center Awards are presented at our Annual Conference held in Toronto November 17th, 2011.



World Class Agents. World Class Experience.

Brother Canada is thrilled to announce that our **Customer Support Center** has been awarded top honours by the Service Quality Measurement (SQM) Group.

Our 2011 Canadian call center service quality awards include World Class Call Center* and 11 of our agents were ranked as “World Class Agents*”. “(They’re pretty thrilled too.)”

DANIEL CHERY
PIERRE LAVIGNE
PIERRE LEGAULT
SHAUN LYDON
BRENDAN MACCUISH
GARY MCGLYNN
ALEX MEDIATI
HUGO MERCURE
JIMMY TSAPEKIS
KIM WATSON
SAM WONG

GREAT CUSTOMER SERVICE STORIES

AWARD WINNING STORIES FROM THE FRONT LINES

GETTING URGENT ANTIBIOTICS TO MEMBER IN PERU

"I DID NOT GIVE UP"

I recently had the opportunity to assist one of our members who had travelled to Peru and needed urgent care services. The member needed antibiotics, which under normal situations wouldn't be covered when provided by an out-of-country pharmacy, but due to the urgent need, we were able to review for reimbursement.

Unfortunately, the member's pharmacy receipts were not legible, which would normally result in their claim form being returned. In an effort to prevent this delay in reimbursement and additional work on the member's behalf, I offered to call the pharmacy in Peru to obtain the required information.

To complicate matters more, the telephone number on the receipt was invalid but I did not give up. I called the Peruvian Embassy in the United States in an effort to obtain a valid telephone number for this pharmacy. After obtaining the valid phone number, and as a bilingual representative, I was able to communicate with this pharmacy via phone and email.

It took several phone call conversations and email communications via their website requesting the necessary information from the pharmacist in Peru. With hard work and determination, I was finally able to get the required documentation and have the member's reimbursement processed.

The member was very surprised that the Plan would put that much effort into resolving his issue and I was happy to exceed his expectations. It's cases like this that make me proud to be a customer service representative.

Barnney Sandoval – Blue Cross Blue Shield of Vermont

PERSISTENCE RESTORES NEEDY MEMBER'S HEALTH COVERAGE

"IT WAS THE RIGHT THING TO DO."

As Bob Salisbury's supervisor, I am honored to share a story about Bob's dedication to exceptional customer experience. This experience touched many customers; a plan member, medical providers and government agencies. Most of those involved are completely unaware of the special customer care Bob provided.

A plan member called with a simple question about her medical insurance. Initially, there was nothing unusual about the call. Bob reviewed the member's account and realized, due to a change in eligibility, she no longer had health insurance coverage.

Since this customer did not request any additional information, Bob's only duty was to inform her that she was no longer covered by our plan. Instead, Bob went one-step further; he reviewed the customer's information and realized that because of the loss in coverage, she was liable for thousands of dollars in pending, unpaid medical bills.

Bob's continued persistence revealed several communication challenges with this particular special needs plan member. This member is blind, suffers from short-term memory loss due to a fall and has very limited financial resources. Most importantly, she had recently lost her support system due to a family death.

Bob understood this member needed assistance due to her fragile state. He placed calls and shared important information with local senior and government resources.

As a result, the member met at her home with local agencies that could help. An error that was discovered during the meeting, resulted in two government agencies working together to reinstate the member's insurance coverage.

In the meantime, Bob diligently monitored the member's account to make sure her medical bills and claims were reprocessed and to eliminate her financial liability. He attempted to contact her several times during this period but, unfortunately, she lost her telephone service and could not be reached.

To this day, the member is completely unaware of the exceptional customer service Bob provided. Nevertheless, his efforts behind the scenes to coordinate assistance resources ensured proper claims processing, resolved her coverage eligibility and saved her a significant amount of money. His efforts also ensured she had much needed health coverage.

Bob doesn't feel what he did was extraordinary, he feels he just did his job. His efforts weren't for recognition or appreciation. He simply provided outstanding customer service because as he said, "it was the right thing to do."

Robert Salisbury – Blue Cross of Idaho

HELPING VISUALLY-IMPAIRED PERSON SET UP PRINTER OVER THE PHONE

"I ALSO LIKE TO BELIEVE THAT I HELPED TO BUILD HER CONFIDENCE."

I've been a customer service agent at Brother for three years and helping a customer over the phone can sometimes be a challenge. The main challenge is in regards to the fact that we can't see each other and the main method of communicating is through a common language.

At Brother Canada, we offer support in both English and French. Occasionally, if the customer needs support in another language, and if we have an agent that can speak that specific language, we'll go that extra step and support them in their preferred language, because we believe in going 'over and above' for our customers.

One of the experiences I had was helping a customer that had vision problems. She needed to set up her Brother wireless printer over her home network but it was near impossible for her to do this since she needed to see the keys on the machine to set it up properly. This was quite the challenge because the customer had no way of seeing the keys that I needed

to refer to or the characters she needed to enter to complete the process.

So I proceeded to spend the first several minutes just getting her used to the keypad and going over the control panel with her from a tactile perspective. Within a few tries, she was able to memorize the location of certain keys and with my guidance she was able to remember some of the sequence.

However, since the sequence of steps required accessing several functions, I immediately considered using shortcut keys so that she could get to the right submenu in fewer steps.

It became a little tricky when we got to the network security function of the process. All customers looking to set up a wireless machine need to enter security information in regards to their wireless network.

Luckily for us, the printer makes a beeping sound with every entry. So I guided her along the process by listening to the beeps required at each step. The difficulty was in trying to figure out the right number of beeps with the right function that needed to be selected. With quite a bit of perseverance we managed to figure out the right number of beeps per step. I really felt proud to have helped out our customer in such a unique situation.

I had always assumed (up until that point) that language was the main barrier to phone support, but other limitations can also be a barrier too. I didn't want that to get in the way of helping out our customer though! I also like to believe that I helped to build her confidence by showing that there are no limitations to what someone can do if they just persevere and have a little support along the way!

Sam Wong – Brother Canada

FINDING THE PERFECT GIFT FOR HUSBAND'S 50TH BIRTHDAY

"I ALWAYS WANT THE COLLECTOR TO HAVE A POSITIVE EXPERIENCE."

Building a good relationship with Collectors has always been a practice of mine, as I always want the Collector to have a positive experience during their interaction with me until the Collector hangs up their phone.

I had a Collector who did not have access to a computer or any relative to assist her in seeing what Air Miles has to offer online. She desperately wanted to order a birthday gift for her husband who was going to celebrate his 50th birthday. I advised her we have more than 1,000 different rewards online.

She said he always kept eyeing a laptop or computer, which they could not afford. She said he also loves to read books which are, again, expensive to buy.

I suggested an Apple iPad so he can browse the web, send email and even read books with portability. She loved the idea but there was a slight problem. She was just short of a couple of Air Miles. She was willing to pay for the difference which I advised her that she

cannot do.

As a goodwill gesture I talked to a supervisor to see if I could do something for her. I had to put her on hold, spoke to the Lead Representative who was kind enough to put the needed Air Miles into the account and book it.

The Collector was ecstatic! She could not stop thanking me for this extraordinary gesture. Moreover, she did not have to pay a penny. I was glad to help her find the perfect gift for her husband.

Blaise D'Mello – LoyaltyOne

ARRANGING TO BRING MAN WITH BROKEN HIP HOME

"I'M 62 AND I CAN BARELY MOVE BECAUSE OF THE PAIN."

One busy Monday morning, I received a call and heard a man's snuffle. "Thanks for calling Air Miles, Samina speaking, how may I help you?" I asked.

"Yes," he cleared his throat, covering up that he was crying. "I've been trying to get help for the past few days, but nothing has happened so far."

"What seems to be the problem?"

"I'm on vacation and I've broken my hip. I can't get treatment here, so I want to come home. I'm 62 and I can barely move because of the pain," his voice trembled. "Every time I've called, no one would help. Please, do something! I want to come home."

"Certainly. I can book you a flight right away."

"No!" he cried. "Someone tried to book me a flight, and it was over \$2000 because no Air Miles seats were available. I can't afford that. Listen, I'm in a foreign country and I can't help myself because of my hip. Is there anything you can do?" he asked, his voice cracking as he began to sob.

"Okay," I said soothingly. "Let me put you on hold and call your airline."

I dialed the airline's number. After 20 minutes of negotiating, I had lowered the ticket's price to \$200. I went back to the other line and gave the man the good news.

"Oh, thank you, thank you!" he exclaimed, crying again. The happiness and relief in his voice was so genuine, it made me smile myself. "Of course, no problem."

"You're an angel," he said gratefully. "You may have saved my life!"

I had a warm fuzzy feeling in my stomach, like I'd really made a difference in his life. That part wasn't in the job description, but that I could make a difference, meant the world to me.

Samina Rifat – LoyaltyOne

GOING THE EXTRA DISTANCE FOR SURGEONS' CELL PHONE NEEDS

"IT ISN'T OFTEN THAT ONE COMES ACROSS A PERSON WHO SIMPLY SHINES AT THEIR JOB."

I would like to take this opportunity to tell Rogers what a fabulous employee they have in Danny Sipchand. Working for the Department of Surgery at a university as a Finance Assistant, it falls to me to order surgeons' cell phones, deal with billing issues, have travel packages put on for their trips, and make certain they are getting good value.

Cell phones are a vital part of a surgeon's practice, as they serve as pagers, schedulers and phones. Situations truly can be life or death, especially if a surgeon is on call. They rely on their phones more than

most professionals do.

This makes them very demanding customers, as dependability is crucial for them. I regularly deal with cell phone carriers on behalf of almost 90 surgeons. They have iPhones, Blackberrys, and Androids. This doesn't make it easy to service their needs as no two are alike.

Since I have had Danny Sipchand as my dedicated Rogers rep, I have found that the stress of handling all these accounts has gone. He constantly surprises me by going the extra distance, whether it is to review an account's history to see if the most cost efficient package is in place, give recommendations on the most appropriate travel package based on usage for that account, or handle any issues that might arise.

Danny consistently, eagerly, and most pleasantly, meets and exceeds my expectations. I have yet to have Danny disappoint. This in itself is incredible, as I've had many, many issues with Rogers' representatives over the past three years.

It is only since I've worked with Danny that I have become a huge Rogers' fan and I can honestly say that the credit for this goes directly to him. It isn't often that one comes across a person who simply shines at their job. His enthusiasm for his job shows each and every time I contact him.

I actually do boast to people who have corporate accounts with various cell phone carriers that no one could be luckier than I am with my rep. I'm not easy to please, as I am expected to provide excellent service to my many demanding surgeons.

If they aren't happy, I'm not happy! And we are all extremely happy with Danny Sipchand.

Recently I asked Danny about an account that was corporate, but not one of the university's accounts. One of my surgeons was moving from one corporate account over to another corporate account. Although I knew I was asking something of him that was out of his area, he not only assisted, he orchestrated the move so that the account was moved with no hassle, no problems, no glitches and no worries.

This is so typical of what I have come to expect from Danny. He thinks outside the box and genuinely tries to help with any situation. I told my own manager that we could use more people like Danny in our department!

I might add that I have recently switched my personal cell phone from another carrier to Rogers. This is something I wouldn't have considered in the past. However, dealing with Danny has convinced me that this is a company I can trust, with employees who care.

I no longer dread having to contact Rogers regarding a problem or a change I need made. I look forward to Danny's cheerful reply and I know that I am in good hands!

Danny Sipchand – Rogers Enterprise Service Delivery

RETRIEVING PASSPORT, CARDS FOR DISTRAUGHT TRAVELLER

"SHE WAS SO RELIEVED SHE STARTED CRYING."

I have rushed cards all across the world, had customers going from panic and tears to laughter and joy. I have felt the personal connections so deep that I felt like I was part of their families. I make connections and impact customer lives on a daily basis, that's what I do and love. I would like to share

with you a call that I took recently that stands out to me.

As the call came through, I barely introduced myself before I heard a panicked and frantic voice, "It's gone! I can't find the cards anywhere. I can't even find my passport! I feel like I can't even breathe right now."

I empathized with her right away and I told her that I was going to take care of it and not to worry. She then told me that she was out of the country, traveling. I empathized with her again and knew this was going to be a unique situation.

After getting some more information, I was able to find her accounts and go over transactions with her. She told me she was on this trip alone and just separated from her husband. I could hear her sobbing.

She said her mind really wasn't where it should be. I couldn't imagine what she was going through. I comforted her and talked to her about the separation.

I then asked her if she remembered where she was last. She told me that she was in a taxi and went to pull out cash and suspects that when she was pulling out the cash her pocketbook, which had her cards in it, might have fallen out of the purse.

She then said, "I'll never get it back. It's gone!" Automatically I was on the computer searching for taxi contact numbers within that city. I asked the customer where the taxi dropped her off and got the exact address from her.

I could still hear the panic in her voice. I comforted her and reassured her that I was going to take care of this. I asked if I could place her on hold.

The very first taxi company I called said that they just received notification that a woman's passport and cards were left behind in a taxi. They would need the lady to describe it and come in person to get it. I asked if I could conference the customer in.

I went back to the customer and told her. She said, "Oh my God! Are you serious?" It was the customer's pocketbook! The customer was ecstatic! The place where they were holding her cards was not far from the customer. She had enough cash on her to get there.

I gave her my number and told her to call me back once she got there and had her passport and cards. I wanted to make sure she was getting back what she needed. She called me back about 20 minutes later, which felt like hours to me. I couldn't handle the anticipation of waiting to make sure she received her belongings.

When she called back she asked, "What was your name again? I can't believe you did all that for me. Where are you from?" She was so relieved she started crying.

She told me she would never forget, not only getting her passport and cards back but the conversation we had in regards to her separation. She told me it meant a lot to her. I felt like I was talking to one of my friends at this point.

She said it surprised her that I cared so much about her. I told her not to worry and that we appreciated her business and it's helping customers like her that makes me feel proud to be a CSR. I knew from that point on she was going to be a Scotiabank customer for life.

A typical day for me is going the extra mile and delivering exceptional customer service. It's something I strive to achieve each and every day; it's second nature to me. This is why every day, every customer,

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More than 57,000 prospects authorizing and approving expenditures in the boardroom, on the front lines, in the IT corridors, in the centres of support and fulfillment, on the road with delivery, and creating customer loyalty. Our readers link you to all the right executives and managers in FOUR KEY ROLES at the largest and fastest growing companies in Canada.



FUND

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Sarah O'Connor x 221

every call, I truly feel empowered with my title as a CSR.

I help my customers become financially better off by finding unique solutions to suit their everyday financial needs. As a CSR we have the power to care and create positive memorable experiences for our customers. It's all about the experience whether it's a basic balance inquiry, a complicated situation or an upset customer I'm up for the challenge and can't wait to make that a memorable experience for my customers.

Tricia Hann – Scotiabank

HOPE FOR A BETTER TOMORROW

"SHE LEFT WITH HER DAUGHTER WITH ONLY SOME POCKET CHANGE AND A SCOTIACARD."

My goal as a Customer Service Officer is to be committed to providing World Class Care. Every Customer, Every time. I have a passion for service excellence and always do my utmost in creating memorable customer experiences.

I received a call late on a Friday night from a woman sounding panicked and out of breath. The woman was calling from a payphone in a rural area of Saskatchewan with her two-year-old daughter crying in the background. My immediate response was to reassure her that I was here to help.

I learned the woman was recently new to the area and needed help but did not know where to go. She explained that she had a domestic dispute with her husband and left. I could empathize with the customer as life sometimes brings us a lot of challenges and obstacles that we need to overcome.

Abused and battered, she left with her daughter with only some pocket change and a Scotiacard. I learned that the woman was married to a man who was physically abusive to the extent she could take no more. I tried not to let the situation affect me as I needed to focus on the customer and situation at hand.

I comforted her and gave her reassurance that everything will be okay. I stressed that I was there for her and would remain on the line until a solution was found.

They had no one. No family or loved ones that could help them in their time of need.

I searched Google and immediately looked up a local women's shelter. I found a location only 30 minutes away.

One of the customer's immediate concerns was how she was going to get to the shelter as she feared that her husband may have emptied their joint bank account. I pulled up her account information and it was clear that her suspicions were correct.

I took immediate action and recommended to my manager that we provide emergency cash due to the customer's circumstance so she could take a taxi to the women's shelter. I searched on Google again to see if there was a cab company that accepted Interac. Luckily, I found one and called them for an estimate of what the cost of cab fare would be from the customer's current location to the shelter.

I provided the cab company the customer's location. The emergency cash was granted. I stayed on the line with the customer until the taxi arrived.

I proceeded to contact the women's shelter to advise them that a woman and her two-year-old

daughter would be arriving shortly. I asked the woman at the shelter if she could be so kind as to give me a quick call to confirm that they arrived safely.

Forty-five minutes later, I received a call from the women's shelter confirming that the young lady and her daughter arrived. The social worker went on to say that she wanted to express her gratitude to me for my assistance and that I had helped the woman and her daughter hope for a better future. It is times like these I realize how important my role is and the positive impact we can all make as Customer Service Officers at Scotiabank.

Mally Metlege – Scotiabank

REUNITING CLIENT WITH PURSE REVIVES HAPPY VACATION

"A WOMAN'S PURSE IS HER LIFE, I'D RATHER LOSE MY HUSBAND."

While every day is an adventure, this is doubly true when you work in customer service.

I received a call from a national retail store employee asking for my assistance. A purse had been found containing a Scotiabank client card and they hoped I could help my client reconnect with their belongings. After recording the employee's contact information, I assured them I would do whatever was needed to help solve the problem and follow up with them when resolved.

I immediately left a voice mail for the client at home, but right before disconnecting, it came to my attention the real gravity of the problem: the client and store's area codes were three provinces apart. Realizing my customer was now far from home, and without a purse, I immediately doubled my efforts. I was concerned for their well-being and knew that I would have to get creative in order to speak with them.

Much to my chagrin, trying a secondary office number only confirmed my suspicions that they were, in fact, away on vacation. After pleading with the receptionist about the urgent need to get in touch with my client, they reluctantly provided me with an unlisted cell phone number.

Then, as if out of a Three Stooges movie, I heard the line ring twice and my new friend, the employee at the store, answered my client's phone which was, of course, resting comfortably in the found purse. I relayed to the receptionist my fruitless efforts in calling the cell, and asked if they knew more about where my client was vacationing and who they might be staying with.

As luck would have it, the office was small and they knew that the trip was to visit with a sister in Toronto. Unfortunately, the only information they had about the sister was a name.

My first real break appeared when I discovered that the sister's phone number was listed on a phone directory website. My client's in-law actually answered the phone and knew about the situation intimately. A search party was out as we spoke, on the hunt for this missing purse.

Gratefully, I was provided a reliable cell number. The sister answered the phone within one ring, and immediately handed the phone over to my client.

I remembered overhearing a hesitant and confused voice ask, "How is Scotiabank calling you on my phone?" Understandably, my client was crying and audibly upset, so much that before I could even

introduce myself my client exclaimed, "Someone stole my purse! Any charges on my cards aren't mine! Stop them! Catch them!"

Once I had a chance to reply, I calmly explained, "Your purse has been found at a store today." After about five seconds of dead silence, they said, "Oh my Lord how could we have forgotten about that last store - is it still there?" So I conveyed that everything was safe and sound, in fact waiting for pick-up at the store's service desk.

I could tangibly feel the sense of relief on the other end of the line, followed by a torrent of appreciation, "A woman's purse is her life, I'd rather lose my husband than my purse!" This was the comic relief I think we both needed, and we both shared a heartfelt laugh.

My client reassured me that they were only a few minutes away from the store and were headed there now. Before I was let go they had to ask me, "Exactly how did you know to call my sister? How on earth do you even know her number?"

So I proceeded to explain the comedy of errors surrounding how I managed to find where they were. My client was beyond impressed that I obviously put myself in their shoes, because as the client put it, I simply could have left a voice mail and moved on with my day. The client told me that I "completely floored them" with going further to make it right.

This type of customer experience is not entirely an everyday occurrence. It certainly left a lasting impression for the customer, and provided me the satisfaction in truly making a difference for them.

Hours later I followed up with the customer on their cell phone to make sure they had reached the eye of the storm, and if there was the need to report anything lost. Wonderfully, nothing was missing and the customer could continue with their visit. After thanking them for their business, I knew that the vacation was repaired, and I would probably be an anecdote to a great story for them to tell when they returned home.

Gordon Ryan – Scotiabank

FOLLOWING AN ISSUE TO ITS RESOLUTION

"MY CUSTOMER WAS EXTREMELY FRUSTRATED AND WAS TRYING HARD TO REMAIN CALM."

When I think about my retirement I imagine a stress free time when you can enjoy yourself and take advantage of the savings you have built up during your years of working. Unfortunately, for one customer, that retirement was permanently put on hold until his funds could be released from his account.

During my first conversation with this customer I learned that he had made multiple calls to our call center for an update on the status of his retirement package and the transfer of his funds to his personal retirement plan. My customer was extremely frustrated and was trying hard to remain calm. I could hear in his voice that he was struggling to keep everything professional.

He had been pro-active ensuring that all the necessary paperwork had been forwarded so there was no delay in receiving his retirement installments. Although I do my best with every call to find resolution I knew right from the beginning it was up to me to resolve this issue to ease the burden of follow up for

CSR FINALISTS FOR CSR OF THE YEAR

my customer.

My customer was previously told that we had all the necessary information to ensure that he would be receiving his monthly retirement payments. A few days later, a representative in another department called to advise him that we could not continue with the request as certain plan stipulations were not met. This delay was going to stop him from receiving his retirement installment, posing severe financial stress on him.

I knew further investigation would be required before his issues could be resolved. I assured him that I would be taking ownership of his account and that there would be no more back and forth. Being an inbound call center we typically do not provide our personal extensions however, I made an exception.

I explained I would be in contact in the next couple of days with the next steps to take. There was no way I was going to transfer this man to another line or tell him someone would be in touch.

Once the call had finished, I contacted the necessary teams to find the cause for the delay and a solution for the customer. In a very short time I received a response advising that nothing could be done as the plan rules had to be followed and the member would have to wait until a specific date for us to be able to transfer his funds.

I promptly called the customer to provide this update and promised him I would monitor his account to ensure that once this date arrived, the transfer would go through. Although he was no closer to

receiving his retirement income, he was pleased that I had called him back the same day and was comforted that we were aware of his situation. I was pleased to hear that he had faith in me and was feeling hopeful that resolution was getting closer.

Regrettably, for my customer, the date came and passed, and no funds were transferred. I started the necessary follow-up and was told that there was yet another delay which was out of our control. I was dismayed that my customer was no closer to getting his money and concerned as I knew he was relying on this money to survive.

With apprehension, I immediately contacted my customer with this update. Suffice to say he was not at all pleased with the latest update. He was at a loss and could not understand how this could be happening. Once again I assured him I was on top of it and would continue to find resolution.

I started making phone calls and emails on my breaks/lunches (as the queue was too busy to get time off to do it) to other areas, ensuring that I had covered every possible contact. After a great deal of persistence, I was able to get assistance from a colleague in another department and they expedited the issue by working with the customer's former employer to facilitate the transfer.

When I think back, I know that it would have been easier for me to have provided the initial response that there was nothing we could do and leave it at that. At the time I tried to imagine myself in the customer's shoes and if I were him I would want

to know that there was someone on my side who understood and honestly wanted to help me.

Following up on an issue to its resolution and building trust with the customer is something I strive to do every day. For this particular situation it was truly rewarding to find out a few days later that the member had called back to let me know how thankful he was that I helped him right to the end.

He had an income again, one that he had saved all his life for. It was very rewarding to have taken the time to make the extra phone calls and different contacts to find the resolution.

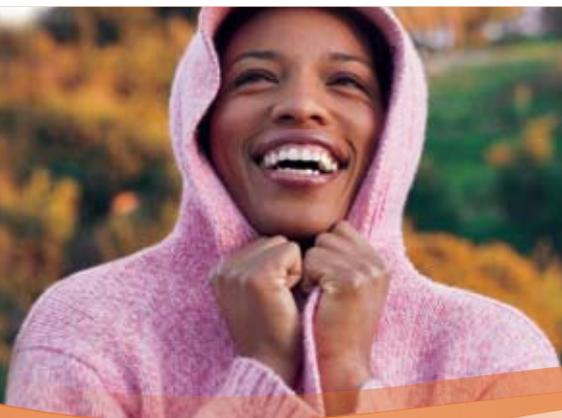
Valerie Dibowski – Sun Life Financial

THIS MARINE WILL NEVER FORGET DAUGHTER'S EYE EXAM HELP

"JUST THE ACT OF CARING ENOUGH TO GO THAT EXTRA MILE MADE A BIG DIFFERENCE FOR ME TODAY."

Kim spoke with a member who was experiencing problems with a doctor when confirming eligibility for his daughter. During their conversation the member began to cry. While they talked, Kim learned the birth date of his twins which is often an issue with insurance claims. The member was tired and frustrated with insurance companies and doctors' offices.

Upon reviewing the account Kim determined why the doctor was having trouble confirming the daughter's eligibility. Kim placed the caller on hold and contacted the office to give them an authorization



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



The insights we've gained through our 10-year partnership with SQM have helped us become the world-class call center we are today.

- **California and Ohio Call Centers – World Class Certified**
- **Winner for Highest Customer Satisfaction by Industry: Insurance**
- **Winner of Highest Customer Satisfaction: Business to Business**
- **95% of eligible CSRs received World Class Certification**

Best wishes and congratulations to all of the exceptional organizations earning SQM recognition for 2011!

Congratulations to **Kim Ostry**, finalist for CSR of the Year.

Congratulations to **Kim Ostry** and **Jennifer Seely**, who are being recognized for World Class Improvement.

so the member's daughter would get her eye exam. Kim returned to the member's call to let him know everything was resolved.

The caller felt so strongly about the service Kim provided he called back and through sobbing tears left this message:

"Kim just helped me. I spent 14 years in the Marine Corps and have completed two trips to Iraq. After coming home I got in a very bad motorcycle accident and spent four months in the hospital. My twin girls were born three months premature. My wife had numerous medical conditions, from depression to chronic fatigue, blood disorder, and a few surgeries. My whole family has been in and out of hospitals and doctors' offices for the past 12 years. In my entire existence dealing with insurance companies, I never

had one representative call on my behalf to a doctor's office to fix a problem I was having. And I just wanted to say, thank you, because she did something for me that I will never forget for as long as I live. Just the act of caring enough to go that extra mile made a big difference for me today. Every day counts for me because of this debilitating pain. Today was a good day just because of that one phone call and I wanted to make sure you were aware of her work ethic."

Kim Ostry – VSP Vision Care

ABOUT SQM GROUP

Since 1996, Service Quality Measurement (SQM) Group has been a call center industry leader for improving our clients' operating cost, customer service and retention. Some clients have improved their FCR performance by as much as 12 percent within 30 days of implementing SQM's FCR best practices. Our research also shows that when you improve your FCR, not only do you achieve operational savings, you also reduce customers at risk which is typically a 5-10 times greater savings opportunity than the operational FCR improvement savings.

GREAT CSAT CSR COACHING STORIES

NOMINATION STORIES OF TOP SIX FINALISTS FOR SUPERVISOR OF THE YEAR

NEVER MISTAKE ACTIVITY FOR ACHIEVEMENT

"I HAVE HAD THREE PEOPLE ON MY TEAM WHO RECENTLY OUTPERFORMED EVEN MY EXPECTATIONS."

Donald Wynant has been a Supervisor in Customer Service for just over a year. In this short amount of time he has truly lived the principle of working smarter and not just harder. In his leadership role he has proven to be an asset and inspiration to those around him by constantly finding new ways to improve our member experiences, increasing effectiveness in coaching team members and, all the while, having a little fun while doing it!

He believes an engaged team is an effective team. Donald continuously challenges himself to exceed expectations and rallies his team to join him in the effort - and it shows!

A Senior Customer Service Representative said of Donald's coaching sessions:

I always looked forward to our 45 minute bi-monthly coaching sessions as I knew it was my time to go over my performance for the week. We would review all aspects of my performance, either outstanding or areas of opportunity. Donald would always focus on the positive moments, while finding ways to improve on other areas.

In EVERY coaching, Donald would ask "What do you want to achieve here?" OR "where do you see yourself in five years?" My answer was always the same: I aspire to work in BSC's Pharmacy Services area as a Pharmacy Technician. Donald would always see what he could do that would help me achieve this goal, which I loved. It made me feel like I had someone that is there and is willing to help get me to where I would like to be. Donald even scheduled a chair siding in our Pharmacy Services department; which gave me a great understanding of how that department works, and might I add, I loved it!

When asked what his proudest moment as a Supervisor has been, he was quick to share the

following: "One of the things that I am most proud of is working with my direct reports to have them excel at a higher level of performance and for them to constantly be in a state of challenge. I have had three people on my team who recently outperformed even my expectations. One of my team members went from a level 4 performer to a level 1 performer in the course of three months.

"This was done with additional coaching sessions, chair sides and constant positive reinforcement. She has sustained at this level of performance for the last six months. Two other team members were recently promoted to leadership positions. Nothing brings greater satisfaction than seeing hard work come to fruition. They all earned their current recognition and I couldn't be more pleased with their efforts."

Adding to Donald's success is his recent recognition for becoming a World Class Certified Supervisor. What is the secret to his success?

Well, Donald makes it a priority to conduct his 1:1 coach sessions himself, with limited assistance from his Team Lead. He believes that Supervisors should adhere to their own level for FCR - as it relates to coaching. This entails making the coaching message pertinent, have impact and be challenging, the FIRST time around. He has proven to be successful in his effort.

The more genuine the interaction, the more impact the message has! At the end of the day Donald measures his success not only by his team numbers but by the perception of his team and the feedback they give him. He emulates the motto, "Be more concerned with your character than your reputation, because your character is what you really are, while your reputation is merely what others think you are."

Donald Wynant – Blue Shield of California

DAILY HANDS-ON APPROACH FOSTERS FCR EXCELLENCE

"HER HIGHER ACHIEVING AGENTS ARE PARTNERED WITH THE LOWER ACHIEVERS TO SHARE BEST

PRACTICES."

As a Call Center Supervisor, Sandra Wilson promotes and fosters FCR 'excellence' daily with her staff by taking a hands-on approach to her day-to-day activities. Her goal, as well as her team's, is to resolve the Member's issue the first time they call. Sandra routinely reviews processes to ensure they are working well and will challenge and make recommendations to change those that do not, in order to improve her FCR and Csat scores.

Sandy has changed the team's production mindset to an FCR mindset. She stresses the importance of resolving Members' issues, by meeting the promises made to our Members and stressing consistent follow up.

While the team is still held to the production standard, the team finds the critical balance between FCR and production. Sandy effectively assists the business teams in understanding key FCR activities by modeling what is successfully applied in her department.

Sandra regularly coaches her lower achievers in an effort to drive their scores upward. She makes it a practice to share every survey comment, both good and bad, to allow staff to see issues from the Member's perspective. She explains the why and asks staff for their participation in changing behavior to increase their scores. Her higher achieving agents are partnered with the lower achievers to share best practices.

Sandra willingly shares best practices with her peers. Sandra is a participant in First Contact Communication workgroup which facilitates sharing and driving the message of FCR to Service and the call center agents. She constantly seeks ways to improve the FCR process and uses the SQM portal as a resource to gain information and drive efficiencies.

Sandy participates in a weekly departmental FCR workgroup to identify gaps and opportunities at the individual level or team level. Sandy works with the group to drill down and improve upon our top callers.

SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

As a result of her participation in this work group, Sandra was responsible for the creation of our department's escalation/repeat caller phone queue. Additionally she was a guest speaker at the Horizon Enterprise Best Practice Workgroup where she shared day-to-day tasks that need to be accomplished in order to have a full understanding of the impact of being 'in the data' of SQM portal.

Sandy regularly documents her tasks, her team goals and next steps. She is the department's lead for the FCR Communication workgroup. She also is the co-lead on maintaining the SQM master list monthly. She takes an active role in all departmental FCR activities and effectively communicates with her peers, managers, and co-workers.

She prioritizes and responds timely to ensure FCR goals are met. She actively participates in meetings interjecting and offering valuable insight. She continues to be driven to meet and exceed the goals of the department and enterprise.

She understands here at Horizon BCBSNJ we are looking to change the culture of customer service in order to gain the Members trust that we will resolve their issue with one contact. She drives this message home to her staff daily and coaches her staff on both the positive and negative surveys so as individuals the team continues to improve.

Sandra Wilson – **Horizon Blue Cross Blue Shield of New Jersey**

BOILING A COMPLICATED PROCESS DOWN TO A COUPLE OF SIMPLE STEPS **"WHAT YOU REALLY CAN'T TEACH IS PASSION"**

There are so many individual stories in which Deborah worked effectively with a specific CSR, or in a team environment, to improve our overall standing as world class call center. Similar to the well established customer service strategy of winning over customers one at a time, the thing that stands out for me is how Deborah works with our CSRs one at a time to improve their overall performance.

Specifically, Deborah worked hard to have a positive influence on one of our young CSRs. This young man was struggling with various aspects of his job, both in terms of customer results and overall attitude.

True to Deborah's character, she addressed his issues in an honest and transparent manner. She explained to him that his performance spoke negatively to the impression he was creating both with our customers and with our leadership team. Instead of making this all about the negative, Deborah focused on specific strategies he could undertake to improve, both in terms of individual accountability and in terms of customer perception.

Using our voice of the customer metrics, Deborah was able to demonstrate how taking ownership of the reason for the customer's call, combined with a focus on becoming an advocate for the customer within our process, was the way to improve first call resolution. Once this was taken care of, she assured him that the overall CSR CSAT measures would follow. Of course she was right.

Change doesn't happen overnight, but Deborah was able to take a complicated process and boil it down to a couple of simple steps for him; Understand the reason for the customer's call; Do all you can to resolve the reason for that call on the first call; When you run into obstacles, understand that your job is to

be an advocate for the customer, so act accordingly.

This adjuster was able to turn things around. He is performing at a high level and is now in a position where he can look at promotional opportunities. But surprisingly, once he started performing at the world class level, he also began to take more pride in his personal accountability and his metrics improved dramatically in terms of attendance and compliance.

Although it wasn't a surprise that Deborah was able to turn our adjuster around, what was a surprise, was her reaction when congratulated on the results of her hard work. As she talked about the work that she did with him and the results that she'd seen, there were tears in her eyes. She was so proud of him that she became very emotional.

We can teach people to understand metrics, and there are many good coaches, but what you really can't teach is passion. For Deborah to be so passionate about her job and her results with one of her staff that she was moved to tears, speaks volumes of this passion and of her character. She is truly a standout in our operation and one of the reasons why we perform at the world class level.

Deborah Aiple – **Insurance Corporation of BC**

EDUCATING CALLERS TO OTHER OPTIONS **"I FOUND THIS HELPED TO DIFFUSE THEIR DISAPPOINTMENT."**

I would like to congratulate my Customer Care Leader, Albany Gamera, on her World Class Supervisor designation from SQM. This is a great accomplishment, one that comes with hard work and dedication as a leader and I am very happy for her.

I've had a very brief working relationship with Albany, as I joined on her team in July 2011 and that month I was not at World Class certification levels. On my first coaching session, I didn't know what to expect from her.

We didn't get too far into the session for me to realize how passionate she is about her job as a Customer Care Leader. We went over all the numbers and she also looked at my previous track record for World Class and told me if I want to be nominated again I would have to step it up.

Albany asked me what I found challenging that was causing me not to maintain the average that I used to have, so I shared a few examples with her. They were all examples of when I could not get the availability of the flights that the caller needed. Albany asked if I was willing to focus on what we could do for the caller in the future, even if we could not fulfill the specific need. I told her it was worth a try.

Going forward, as soon as I had a call and I realized that I wouldn't be able to fulfill the caller's request, I immediately started to educate them on some of the other great options that we had available. I found that this helped to diffuse their disappointment and gave them hope for future use.

I would have to say the main thing that resonated with me during those coaching sessions was the confidence that Albany had in me; that I was capable of overcoming those challenges and that she was looking for great results. Albany said, "I have listened to a few of your calls and I am more than confident that you can do this."

So walking away from those sessions, it was no surprise when my World Class numbers increased in August and then again in September. I would like to

thank Albany for the confidence she has placed in me and I wish her the very best.

Congratulations Albany! Your hard work and dedication has paid off.

Albany Gamera – **LoyaltyOne**

WORKING TOGETHER REIGNITES CUSTOMER SERVICE PASSION

"BY LISTENING TO CALLS TOGETHER, WE DISCUSSED WHAT COULD HAVE GONE BETTER."

When entering the 2011 SQM year, I decided to make it my year of change. I had set my goals and once I communicated them to my Supervisor, Lisa Jones, she jumped right on board.

Her passion in making this commitment thrilled me. As the year progressed I began to understand that, even though the support has always been there, nothing would happen until I had made the decision to change and that was why she became so excited.

I always thought I had what it took to do my job but this year Lisa has taught me the true meaning of great customer service and so much more. I had no idea that with her faith in me I would have a whole new outlook on the meaning of Customer Service!

Lisa taught me the importance of being patient, understanding and caring with every one of our customers. Through one-on-one coaching sessions, we developed the plan to facilitate the changes. By listening to calls together, we discussed what could have gone better, and with active shadowing, we were able to identify areas where improvements could be made; improvements that would impact and change a customer's response from somewhat satisfied to very satisfied.

We noticed trends in my tone of voice, habits and mannerisms that may have been contributing to my poor SQM results. What I thought as helping was sometimes not helpful at all because it seemed like I was rushing to beat the clock instead of providing quality service.

Step by step, she showed me how to apply what I had learned to each and every call. We would discuss which tips I was able to incorporate and which ones I still struggled with.

At one point during the year I remember thinking "I am being picked on" and I started to take it personally. Little did I know that was not the case at all; instead I was given the opportunity to take what would be the best mentoring ever. I was being given the vital information I needed in order to see where I was improving and what areas still needed improvement.

I realized that Lisa was showing me how to be patient and understanding with my members by using the same technique with me. She was teaching by doing.

As I mentioned earlier, my technical skills were good however, I was rushing in order to meet my average handle time (AHT) target. At the beginning of the year I was struggling with my meeting my AHT, call monitoring and SQM targets.

Lisa's encouragement and support as I worked on these changes helped me see the bigger picture. It was quite an eye opener that, as I worked on changing my habits to ensure I was providing quality customer service, it helped with my efficiency (AHT) and overall call monitoring scores. Without even realizing it at the time, these metrics also started to improve. By listening to and focusing on the customer (and not

SUPERVISOR FINALISTS FOR SUPERVISOR OF THE YEAR

just the business requirements as I had in the past) I was able to help them more efficiently while still making sure all their questions were answered. Not only did my SQM results improve (yes, I am World Class Certified this year), my AHT decreased and my call monitoring score improved.

Lisa knew what my goals were. What really made a difference was how she approached this.

Lisa helped me to see how I could help myself. Instead of just giving me the information and walking away, she showed me how I could find ways to change and made sure I was comfortable with any new information. By doing this, I gained confidence in myself which helped me achieve the success I have had this year. I found not only did I call upon Lisa's assistance and expertise but I depended on her as well.

Not once was I let down as she was always there no matter how big or small the concern happened to be. Lisa has re-ignited my passion for customer service. Due to her time and dedication I am once again capable of providing the world class service she always believed I could.

Lisa Jones – Sun Life Financial

FINDING SOMETHING TO BETTER AID CUSTOMERS

"IT WAS SOMETIMES HARD FOR ME TO KNOW WHY THE CALL WASN'T WORLD CLASS."

I would like to nominate my supervisor, Nancy Chia, for the hard work she has done, and is still doing, coaching me in every single aspect of my job. Nancy provided encouragement, support and tips on how to provide excellent customer service, tips on dealing with customers, tips on files, walk-ins, great tips on how to improve my AHT, and also how to work efficiently (time management when working on files).

Every month we go through all the SQM calls. Based on the tips I get from Nancy, I

was able to improve my performance and to become a world class performer. In my one-on-one sessions, Nancy and I listen to my calls that were not world class. It was sometimes hard for me to know why the call wasn't world class, but Nancy would always find something that I could do just that much better for my customer.

One time she noticed that the tone of my voice was very monotone, no expression at all, so she gave me a tip on how to change that. The next month, when we got together, we listened to another call and she gave me kudos for using the suggestion she had given me the prior month.

When she noticed I was using the tip, she got all excited and went, "Yes, yes, yes!!" This made me feel great.

Nancy always gets so excited when she is talking about our calls and how our customers feel about us. She is always coaching us, her team, so we can all excel to be world class certified reps.

Nancy is always available to me, even when she has not started work for the day. When she is here, she is here for all of us.

One week I was stuck on a call (the claims history letter was giving me a company's name) and Nancy took over the call for me. It was in the morning before the beginning of her shift! She spoke to the customer, and later she called me and explained how she had resolved the issue.

Another time I had taken down some information from a customer incorrectly and I was going to have to call the customer back to get the correct information. Nancy, thinking of our customer's experience, said that she would review the call to see if I had noted the number incorrectly, or if the customer had given me an incorrect number.

She took the time to listen to the call and found that I had incorrectly written the number down. We were able to make a correction, without the customer being involved. She then coached me on the call and how to listen better for the next time.

Nancy Chia – Insurance Corporation of BC

ENMAX Encompass Inc. is proud to be recognized in the SQM 2011 Call Centre Awards



On behalf of the ENMAX Corporation, ENMAX Encompass is being awarded **First Call Resolution Improvement** for the second consecutive year and **Highest Customer Satisfaction by Industry (Energy)**

Congratulations to our World Class CSRs and Team Supervisor!

Alicia Pienig
Amelia Ressler
Deborah Wood
Erin Cook
Evelyn Arbuckle

Gurpinder Deol
Kristine Hill
Matthew Wagge
Mohamed Shala - Supervisor

Melvin Burt
Paulette Wilson
Ryaan Kraft
Valerie Ellis
Valerie Smith



GREAT IMPROVEMENT STORIES

2011 TOP 10 CSR FOR WCC IMPROVEMENT FINALIST STORIES

HANDS-ON ROLE PRESENTS A DIFFERENT APPROACH

"THE POSITIVE ATMOSPHERE IS EXTREMELY BENEFICIAL."

I began working at the 407 ETR as a temporary employee in the spring of 2004. For six years, I was a VEP Operator. When I found out that my department would be crossed-trained in Customer Service, I was very eager to broaden my skill set and improve my position in the company.

I was trained for Customer Service in early 2010. My first year in the call center was like anyone else's - a work in progress. It is the type of job where you constantly need to be learning and educating yourself. This not only benefits yourself but improves the service you provide to customers.

I believe the biggest reason why I improved my World Class Calls is because of the Customer Service Center. I began working there in September 2010. It has been the best experience of my working career.

Being on the front lines and having a much more hands-on role assisting customers face-to-face, is the reason I have improved. Having great teammates and great leadership is also a contributing factor. We work together as a team and are always encouraging each other to do better. The positive atmosphere is extremely beneficial and I credit this, as well, for my improvement.

The hands-on role gives a CSR a different approach when it comes to customer service. We not only answer questions for customers, but we deal with several different areas that differ from CSRs in the call center. Being exposed to these different areas has allowed me to improve as a Customer Service Representative which has also benefited our customers.

PUTTING A SMILE IN HER VOICE

"SHE IS NO LONGER JUST PROCESSING A TRANSACTION."

This nominee greatly improved her World Class calls this year over 2010. This is an impressive accomplishment worthy of recognition.

She is a personable adjuster who processes her calls with professionalism and efficiency. In the past, she was process driven, more focused on taking the information and processing the claim than on how the customer felt or that the customer had what they needed. Technically she was strong, but customers did not always feel that personal connection we strive for.

Over the past year, she has made it a priority for the customer to have a positive experience with ICBC. She has a natural tendency to speak very quickly; she has slowed down and tries to connect with the customer on a personal level.

When speaking with the customers, she talks to them as she would a friend; has real conversations with them, uses their name throughout the call, and although the customer is not usually calling under happy circumstances, you can often hear her laughing

with them putting them at ease.

At the beginning of each call, she tells the customer what she is going to do so that the customer knows what to expect. She expresses empathy for their situation and treats everyone with respect. She is no longer just processing a transaction. At the end of each call, she ensures that the customer has the answers to all their questions, knows what the next steps are and ensures that there is nothing that she has not addressed for them.

She is an ambassador for ICBC, someone who you would want your friends and family to have on the other end of the phone if they needed to report a claim. She always has a smile in her voice and her customers can't help but feel her smile and know that everything is going to be okay. This nominee should be recognized for this amazing accomplishment because she is living our vision for success every time she speaks with a customer by understanding them and exceeding their expectations.

MAKING EVERY INTERACTION A MEMORABLE EXPERIENCE

"SHE WANTED TO DEMONSTRATE A BETTER ATTITUDE TOWARDS THE CUSTOMER."

This individual had improved a lot from 2010 to 2011. Her results were improved by her dedication and self-motivation of doing her best.

I still remember her coaching sessions during which she would often ask herself why the customers did not value her effort and were not 100 percent satisfied in her calls when she thought that she was resolving their concerns and helping them with their requirements. Then she started thinking: if she were the customer, what things would she like to hear or perceive? Then think about the service offered.

She started a self-awareness of being better in every call. She wanted to demonstrate a better attitude towards the customer and show more empathy. She is always following the bank's service procedures, making a difference among her peers, being open-minded and receptive to her supervisor's feedback and quality assurance recommendations.

She had a genuine concern for listening and understanding our customers' problems and took the decision to make every interaction a memorable experience. Using kindness, respect and empathy, she took responsibility and followed up all her cases. In conclusion, as her supervisor I can say, in every call she demonstrated her willingness to offer world class service and first call resolution commitment.

SELF-AWARENESS, CARING IMPACT MEMBERS' SATISFACTION

"I NEEDED TO FIND WHAT WAS MISSING WITHIN ME."

I was proud of my World Class Call result last year, but I knew I had it in me to achieve a greater personal goal of 100 percent - for the customers I serve and

me. I am now certified for my third consecutive year.

In my first two years of certification, when I had a survey that was not World Class, I blamed the member and did not take into account the key part that I played in impacting the members' satisfaction. I felt that since my past certifications demonstrated that members liked me, then it must have been an error with the system. My lack of understanding of the members' true needs did not help me meet their total satisfaction.

I'm always looking for ways to improve and better myself on a personal level and decided to set a goal for my SQM surveys to see how high I could go. I would achieve this by treating each member like family and ensuring that they could feel that.

I had many discussions with my supervisor about why the calls did not go the way I thought they did, took all the feedback, and formulated a plan for the year to come. I pride myself on taking ownership of any given situation, but felt there was still something missing that was not letting me connect with every member. I decided to listen to the first month of calls, which were all World Class, to find the key ingredient that I needed to focus on in order to achieve the high goal I set for myself.

After listening to my calls, I found what I was missing. I discovered what the members were looking for and what I was already providing, but not on a consistent basis. That one thing was 'Caring'; caring for the member as if he or she was part of the family to reassure them that I will take care of all their needs.

Although I did not achieve 100 percent World Class this year, I am very satisfied with my increased result. I used all the resources at my disposal to ensure that the members' needs were resolved. By getting rid of the attitude of 'it's everyone else's fault but my own', I was able to key into the members' satisfaction.

It seems so simple, but putting yourself in the members' shoes and thinking that they are the only call you'll have that day frees you from any stress and gives you wings to bring their resolution to new heights. I needed to find what was missing within me - the caring aspect of the call - and then focus on ensuring that was conveyed to the members in order to build a strong relationship and gain their trust. This new approach and self-awareness helped me improve my results, but more importantly let me provide excellent customer service to our customers by going above and beyond and solidifying their relationship with Sun Life.

EMBRACING SELF CHANGE BRINGS ACCOMPLISHMENTS

"I CHANGED MY MIND SET, MY ATTITUDE, THE TONE OF MY VOICE AND MY APPROACH."

Every business needs it, we all personally need it - change. It happens whether we want it to or not, and we all must incorporate it if we want to go further. I now have a new appreciation for change and the power we have to do so.

Unfortunately, last year I was not a World Class Certified representative. This for me was not personally acceptable.

As I reflected on my 2010 World Class rating, I knew that 2011 had to be different - it was to be the year of change. Most importantly, it would need to be the year of self-change if I was to become SQM certified!

The desire to change must come from within and now I was ready. As the new SQM year started, my goal was to be World Class Certified and I would not settle for less.

I created my personal goals and wrote them down. Every day I would look at my goals as a reminder to inspire me.

You will find on my desk to this very day the following note - Great Aspirations Leaves Award - my goals and aspirations were set. My supervisor said she would do anything necessary to help me achieve them.

I was now on my way to become the 'one' to provide the best customer service! Change was happening!

Through one-on-one coaching sessions, my supervisor and I identified areas I could work on and developed plans. I was determined to achieve these goals and soaked in as much feedback and information I could get my hands on.

We noticed trends in my tone of voice, habits and mannerisms. We began to identify areas where improvement was needed; things that would impact and change a customer's response from somewhat satisfied to very satisfied.

What I thought as helping was sometimes not helpful at all because it seemed like I was rushing to beat the clock instead of providing quality service. I persevered and knew that all I had to do was ask, if I needed to know more or needed more support.

I found myself liking the feeling that I was not abandoned but actually guided, as promised. When I had that feeling, everything fell together.

The tone of my voice is now softer so that the customer can hear that I care, that I understand, and am sincere in what I say. I can now recognize during a call when a customer's frustration may actually be causing me frustration. With that recognition I am able to remain calm and patient in order to stay focused and ensure first call resolution.

With the mind set of 'one call at a time', the rushing stopped, my customers are very satisfied and at the same time I have seen a significant reduction in my average handle time (AHT)!!! What an eye opener that the two fall together.

I now believe that quality customer service can happen while ensuring AHT targets were met. I changed my mind set, my attitude, the tone of my voice and my approach.

These changes have affected me in so many ways (in achieving my one goal, I am able to achieve many). I know I am providing excellent help to my customers while, at the same time, being a strong contributor to my team.

My SQM World Class Rating improved by 10 percent! My decision to change was what I needed to start my im-

provement. My AHT has also reduced. My Internal Quality rating went from a "meets most" to an "exceeds".

There are so many benefits that I have and will continue to experience due to this decision. Although I am proud of all my achievements I am most ecstatic that this year, my year of change I am a World Class Certified CCR.

A LITTLE SELF REFLECTION LEADS TO BIG SUCCESSES

"I REALIZED I LISTENED MORE EFFECTIVELY WHEN I WAS NOT TALKING."

In 2010, I was not a World Class Certified Representative. Although disappointed, I accepted it and made a promise to myself that the following year I would be certified.

To accomplish this, there would be changes that I would need to make. I began by listening to some of the calls I had taken, both world class and non-world class, and then made a list of my call flow and identified what had worked and what had not. This allowed me to come to several conclusions.

The first and most important was to open the call with a smile and keep smiling during the call. I did not believe it myself until I listened to my calls, but a smile truly can be heard and a 'smiling voice' is more welcoming and relaxing. This will make the caller more relaxed and assists in building more trust.

I realized that I listened more effectively when I was not talking and therefore I made it a point to refrain from interrupting my caller. I would let the caller fin-

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ish what they were saying to not break their train of thought.

To help me, I always have a pen and paper in hand. I got into the habit of taking short notes of what the caller was asking, any probing questions I would have or the points I would need to comment on. I would not be thinking of the answers to the member's questions, but instead take in what they had to say.

When I was searching for an answer, I was not actively listening. When my caller had finished speaking, I would refer back to my notes and take action.

I would summarize the key facts I had jotted down to ensure I understood correctly, at the same time letting the caller know that I had understood them and their needs. In cases where I needed clarification, I would ask questions and never assume.

When speaking with the member, I made a conscious effort to speak slowly as I tend to speak fast. This allowed the caller time to absorb what I was saying. I spoke even slower when I was saying numbers, or anything the caller might need to write down.

I used words that the caller used when they spoke to me - in effect - mirroring them. As long as the jargon they were using was accurate I would use it as well, as it is obvious they were using terms they were comfortable with.

I started showing empathy with my callers by using key phrases such as "I understand what you mean." I found this to be a great way to build rapport with the caller and we all know that this is an integral part of the communication process. Lack of or absence of

rapport can fundamentally affect the outcome of any conversation.

Lastly, I went the extra mile by giving added value to my calls by educating the caller about their plan and what it had to offer. I tried to implement first call resolution on every call, and if I could not, I promised the caller a time frame for my call back. Furthermore, when I did get the odd call where the caller had been bounced around, I would take ownership of the call showing empathy with the caller's situation and assuring them that their issue is being looked after.

By applying these changes to my call flow I noticed an improvement in the quality of my calls. With that came the increased results of my World Class Calls allowing me to achieve my goal and become a World Class Certified CSR. A little self-reflection is all it took to make this happen and to allow me to solidify the relationships I have with the customers I speak with.

INSERTING POSITIVE WORDS INTO THE CONVERSATION

"MY CUSTOMERS SEEMED HAPPIER AND, IN TURN, SO DID I"

Unfortunately, in 2010, I was not a World Class certified representative. This was not something I was very proud of. I was dealing with struggles in my personal life and not performing to my full potential.

I thought I was separating my personal life from my work life however, I came to realize that it was not the case. It was getting more difficult each day to come in with a smile. It was like a circle; as things became

difficult outside of work, things would get worse at work and vice versa. Something needed to happen to break this cycle.

I talked with my supervisor and she made some suggestions. She indicated the importance of trying to put personal issues on the back burner when at work, and put work stresses there, when at home. This made sense; sitting at my desk and worrying would not help my personal life and certainly not improve my work life.

She also suggested that we listen to some of my calls taken and make some notes as to how I could improve. After listening to a few calls we realized that I was not as friendly as I thought I was being.

I also noticed that it was obvious I was not giving my full attention to what the customer was asking for. I was doing the bare minimum and my customers could tell.

I was not using a lot of strong words such as I will, I can or certainly, to make them feel confident in my abilities. This was quite an eye opener and I was happy to have something to work on.

The first thing I did was incorporate some strong positive words into my conversations. I wanted my customers to feel comfortable knowing I would take care of their issue and confident I knew how to. I also started to pay more attention to all the reasons for their call.

After a few weeks I noticed that this was indeed making a difference. My customers seemed happier and, in turn, so did I. I also noticed that when a

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customer was upset, by listening to all their concerns and not taking it personally, they became calm and no longer angry. I was learning to keep the personal feelings out of my calls and remain professional.

I spoke to my peers to see if I could learn from them. One of my colleagues suggested I use my mirror while speaking with our customers to ensure there was a smile on my face which would come out in the tone of my voice.

This is an old trick but one that I had forgotten. By using the mirror during a call I could visually see when my smile disappeared and therefore my focus. Immediately I would turn that smile back on and start focusing again.

I began to notice, that as I renewed my old habits, my confidence returned and my struggles became a thing of the past. As the year progressed I was excited to hear all the positive feedback our customers had to give. The feedback was not just from customers but from my supervisor as well.

My colleagues commented on a noted difference in my demeanor. Work was once again a good place to be, and as my SQM World Class Call rating improved, I saw a domino effect into my other metrics. My call resolution and other metrics such as AHT steadily improved month over month.

I am now involved in pilot groups and am there to help the team out whenever possible. Soon this feeling of achievement and success started to trickle into my personal life. The circle continued as I was feeling better at work, I was feeling better at home and stress

levels started to lower.

Through supervisor coaching, peer support and the realization that I needed to buckle down, I was able to change my tone of voice, improve my listening skills and my overall outlook. By increasing my world class calls, my attitude has been more positive and I once again look forward to coming into the office.

This year I am very proud to share that I am a World Class Certified call centre representative. The SQM Smile is once again on my face and in my voice.

TAKING TIME TO LISTEN AND EXPLAIN THE DETAILS

"NO ONE HAS EVER EXPLAINED MY PLAN TO ME LIKE THIS BEFORE."

In 2010 I was not World Class Certified. This year, I made a commitment to improving my call resolution and CCR satisfaction results and to do this, I had to make some changes.

The main thing I worked on was my attitude. With each call, I put myself in my customer's shoes. I actively listened to the callers' needs and I explained information in a way that they understand. I reminded myself that if there is an opportunity to resolve an issue and satisfy the caller, not only is it better for Sun Life, it is also better for me. I tried to ensure that my callers' concerns were resolved and provided additional information if it helped them.

My Team Leader really helped motivate me to make this change. She brought to my attention calls that were not World Class as coaching opportunities.

We listened to the calls together, and although I was resistant to the feedback at first, I prided myself on seeing situations from the other person's perspective. This helped me to see where I could find improvement in my calls.

Since this time there have been more calls than I can count where the caller would not have been satisfied had I not applied my newly improved skills. I believe I am resolving more issues on the initial call. The following story demonstrates my improved commitment to customer satisfaction and resolution.

A gentleman phoned frustrated because he had been submitting claims for both his wife and himself that were getting declined and he did not understand why. He was extremely irritated with how difficult it was to get the claims processed and explained that he had called before for a similar issue.

I reassured the member that I would resolve his questions and started looking into his claims. He was newly retired and his retiree plan had some clauses that could be confusing. I explained why his claims were declined and took the additional step of asking the member if I could take a moment to review his plan with him.

As we went through his plan details, I saw that he had a health spending account that he was not utilizing and that he had coverage under his wife's plan as well. I took the time to explain how his entire plan worked and also how to co-ordinate expenses to take advantage of all the coverage available to him.

It took a bit more time than just answering his

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initial question. However, at the end of the call the member understood how to maximize the options under both plans.

I have dealt with calls such as this before. What made this call special to me was that at the end of the call the member said, "No one has ever explained my plan to me like this before."

That comment made me feel a sense of fulfillment. I could see that I not only helped resolve his questions for that day, but that my efforts were appreciated and would make his plans with Sun Life easier to manage. We only have a short time on most of our calls and it feels great when I know I have made a difference.

GOING THE EXTRA MILE MAKES A DIFFERENCE *"THEY ARE CALLING FOR HELP."*

I am proud to nominate this individual for the World Class Call Improvement Award. She achieved a 17 percent increase from her last certification period. Her focus this year was on improving her overall scores.

She takes ownership and accountability for every interaction with each call. She does not judge or assume why the caller is calling. Instead she begins every interaction knowing that, 'they are calling you for help'.

This is what she said when asked what keeps her engaged and successful:

They are calling for help. I am here to help them and give them what they need. I make notes of what the customer is asking. Regardless of how the call flows, by writing what the customer is asking for ensures that I meet their needs and First Call Resolution. I take ownership of each call, whether that is reviewing benefits with members or assisting doctors with finding guidelines in their manual. I take pride in my job. I feel good at the end of the day knowing that I

did a good job. Helping people and the company is important to me.

In the comment section on her SQM Report Card, common themes used by her callers to describe their experience with this individual include: knowledgeable, informative, answered all my questions, efficient, professional, communicates well, listens, very helpful and nice. Our callers recognize the customer service she provides almost always exceeds their expectations. This is evident by the calls transferred to a supervisor complimenting this individual on her outstanding customer service.

Direct feedback from our callers includes:

She was wonderful! She was very helpful, pleasant, calming and her listening skills are outstanding. I am very happy with the level of service she provided and wish everyone was that helpful. She was focused and resolved all my issues. She was exceptional!

My whole family has been in and out of hospitals and doctor's offices. In my entire existence dealing with insurances, I have never had a representative call a doctor's office on my behalf and personally fix a problem I was having. Just the act of caring enough to go the extra mile made a big difference. She did something for me that I will never forget for as long as I live.

SETTING REALISTIC EXPECTATIONS RAISES CUSTOMER CONFIDENCE

"SHE DECIDED TO REALLY FOCUS ON THE VOICE OF THE CUSTOMER."

This nominee increased her percentage of world class calls by 13 percent. She has a strong desire to deliver a world class experience on each and every call.

She feels that as a tenured CSR who has been world class certified for the previous four years, her results, as good as they were, should be even better. She decided to really focus on the voice of the customer.

By partnering with her supervisor and listening to calls, she realized that she was inadvertently setting up false expectations for her callers in how quickly they could expect to receive faxed information from her. Once an outbound fax is submitted, it goes to a queue and can take up to 20 minutes to be sent, or even longer if the receiving number is busy and the outbound fax has to line up in the queue again. She realized that something as simple as changing her phrasing from 'it's on its way' to 'you can expect to receive the information within 24 hours' would set a realistic and accurate expectation for her callers, thereby increasing their level of satisfaction and confidence the call was resolved.

She realized that the more comfortable and confident she was with the information she was sharing with her callers, the better her voice of the customer results. She made a conscious effort to stay abreast of new and changing procedures in the call center by proactively reading her online resources.

She also appreciates and supports the way her team shares tips and advice with one another. She has been very motivated by the positive feedback she saw as a result of her efforts to be more confident in herself and the changes she made to her call handling. Additionally, she attributes the monthly feedback sessions with her supervisor and the supportive and open team environment as factors in her success.

She and her peers enjoy recognizing and celebrating each other's successes in team meetings and she strongly believes that partnership and give-and-take of information on the team enhances her ability to provide outstanding service to her callers. As her supervisor, it's my opinion that this individual's focus paid off to the benefit of both her improvement and VSP's gain.

At AIR MILES[®], we strive to excel.



We're thrilled to announce that one of our Associates has been named amongst the Top Finalist for SQM's Annual Call Center Awards Program

Congratulations to:

***Nazreen Abdulla** for being among the finalists for CSR of the Year Award*

*In addition, we'd like to congratulate **Claudia Camaya** for achieving "Supervisor World Class Certification"*

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