

2004 SOCAP SYMPOSIUM Conference Summary

Monday, April 26, 2004

Live Out Loud: Put the Heart and Fun Back Into Business

Amanda Gore

1. Connect your head to your heart, your heart to other hearts and your heart to the heavens!
2. Let go of “stuff,” it makes you sick. Build a bridge and get over the little things that do not matter. Be a giver and not a sucker.
3. Laugh! Wave that wand! Show your endorphins and laugh out loud – it heals.
4. Love! An angry heart is a sick heart and forgiveness is the antidote. Have a purpose, feel happy and belong.
5. Learn, unlearn and relearn. Celebrate life, love and living. Ask yourself what is the best thing that happened to you today?
6. Live out loud!

Staging a Customer Experience

Tyler Shaw, The Geek Squad

Your employees must first buy into the customer experience and believe in the value of your product in order for it to be successful. You must think in terms of providing a solution instead of fixing the problem. A solution entails understanding the business and emotional needs of your customer and successfully satisfying them. A customer experience is not about flash and gimmicks, there must be a true value behind your initiatives.

From Cost Center to Competitive Advantage

Beth Thomas-Kim, Nestle USA

Conduct an internal and external analysis to gain perspective on how your function aligns with the strategic direction of your company. Successful positioning is predicated on relationship development and management. Learn about your internal client's needs and challenges first in order to help them achieve their goals and objectives. Talk about the value you deliver by offering to write articles, speak at meetings and conduct training. Networking is everything! Go to lunch to stay in touch with individuals you don't interact with on a regular basis or people you'd like to get know better. Identify ways to measure success and conduct an internal satisfaction survey.

Leveraging Virtual Agents: Next Generation of Customer Care
Bob Burgin, Finali Corporation

The next generation of customer experience includes the importance of cross-channel analytics. Customer service executives need to leverage intelligent automation, which is virtual agent technology and apply an integrated methodology. The results are shown in case studies – retail, financial services and travel companies. Online service needs a reality check. Self-service generates costly follow up calls and chat ties up reps both online and on the phone. Email also takes multiple exchanges to resolve. Companies are missing a chance to deploy the same strategy for all channels, since there is not enough online functionality. An integrated approach is to deploy the same strategy for all channels, integrate them, measure and analyze contacts and apply learnings for continuous improvement.

How Make Headlines at Your Company
John Cronce, Jockey, International

You have to compete. Like a magazine editor, your job is to produce a compelling product so that it is chosen above the competition. Tell what's important. Newspaper editors ensured that the 9-11 disaster stood out that day, and you need to follow their lead. "Headline" the big news, then prove it through tables and charts. People will forgive you for anything except being boring. You must use clever copy (i.e. titles, call-outs, headlines, decks, quotes, etc.) to entice your audiences into looking at your reports. Then you need to deliver content that provokes, surprises, enrages, delights, saddens and charms them—and keeps them coming back for more.

SOCAP CCMM Panel

Tim Nichols, Eastman Kodak Company; Tom Asher, Levi Strauss & Co.; Linda Pell, Kellogg Company; Sheila Sullivan, Unilever Cosmetics International

The first critical step in using the model requires that you understand what your company and consumers expect from your contact center. The SOCAP CCMM was developed to provide credibility for the contact center industry and to set a standard methodology and process. Shrinking budgets in consumer affairs departments require focused investment, to do more with less. Consumer affairs executives need to understand where to target improvements and when to do so. The goal for the SOCAP CCMM offers a new systematic way to assess and improve the contact center. The maturity of each contact center is different. There are five distinct levels, which can serve as a guide. It is an evolutionary path. Each level provides a layer in the foundation for continuous process improvement. Different processes can be at different levels at one time (not just a level one organization). The "tool-kit" gives you a roadmap on how to achieve a balanced approach to building, maintaining and providing resources for your contact center. It helps you understand where to focus your time, energy and resources to meet your overall objectives. The CCMM is an ongoing process – it is not a one-time assessment tool. The five levels of the SOCAP Contact Center Maturity Model are:

- Level One: Initial/Start-up
- Level Two: Basic/Organizational Knowledge
- Level Three: Expanded/Standardized
- Level Four: Enhanced/Managed/Improvement Cycles Begin
- Level Five: Customer Focused Service/Improvement Based

You do not need to be at the highest level of the SOCAP CCMM in order to provide good service. Technology is an enabler, not a silver bullet. People provide service and management needs to provide support. The customer and data are king.

Call Center Analytics

Clifford Nash, Stanford University

Customer expectations are an example of seamless, social customer experience and are considered “social intelligence” to address experience issues. Online expectations mirror those in other channels. The contact center is an opportunity center for measurement and analytics. When customers go to your website, they don’t know what to expect or how to navigate through it. Frustrated, they leave without completing any transactions – the website has damaged their positive feelings about the company. The key to addressing problems and opportunities for online companies is social intelligence. Interactions with websites are fundamentally social and people relate to websites the same way as relating to others. Use social intelligence to develop engaging, compelling and personalized online experiences. Build the right technology, be socially smart, follow business rules and creatively execute the data. Turn transactions into conversations. Conform social rules and expectations. Deploy a socially intelligent interface on your website. Integrate live help into web processing. Support positive feelings toward the company in the website. Build trust and reliability by answering questions. Following these actions motivates reps and customers will return to the site. Be sure to measure your data correctly from your website. Otherwise, incomplete views of customers, after-the-fact reporting and analysis and disconnected initiatives are the results from inefficient, undisciplined approaches to analysis. Companies should take advantage of the day-to-day captures of communication with customers. Each contact is an opportunity to learn about your business. Customers know more about your business than you do! The website is an extraordinary source of marketing information (when gathered properly) because it is the least expensive information acquisition and the most relevant and realistic data than a survey or focus group could provide. Offer state-of-the-art customer experience and leapfrog the competition. Create extra means of branding and customization, decrease customer service costs and increase sales conversions.

Training to Modernize Skill Sets

Scott Swift, Hunter Douglas

Training programs within a call center environment need constant focus and continual enhancements. Equipping CSRs with the most up to date information, tools and techniques is critical for success. Determine the best length of time for new hire training.

Identify the most effective methods of training in your contact center. Structure CSR training to ensure a customer focus.

Offshore Outsourcing Panel

Rita Wood, Network Direct; Tim Nichols, Eastman Kodak; Tom Rocca, SER Solutions, Inc.; Karen Vaughn, Live Bridge

The appeal of offshore outsourcing will continue as long as it creates value for the businesses employing it. Some of the country's largest consumer-supported businesses are successfully using offshore partners to reduce contact center costs, improve quality, expand service and increase competitive strength. As US-based outsourcers add offshore locations and reduce rates, the companies that are the recipients of today's work will find their cost advantages eroding. The natural dynamic of supply and demand, emergence of the next low-cost labor pool, government actions and the constant drumbeats of new and better technologies will at first reduce and eventually eliminate the current differentials.

CSRs as Problem Solvers

Barbara Rothman, Wellmark International

There is a direct relationship between customer service representatives' role and what is communicated to customers every day about the organization's products, services and culture. Design training to help CSRs make good decisions and maximize options for satisfying customers – not just for following procedures. Train CSRs for the skills they need to perform and to satisfy customer needs. The CSRs acquire special knowledge and skills through daily interaction with customers. When you encourage CSRs to use their capabilities for problem solving, you can increase value to customers and CSRs contribution to the organization.

Defense is in the Details of Product Liability

Rachelle Wassell, Attorney; Cathy LeRoux, Kellogg Company

The consumer file can contain a wealth of information. Many fields are searchable, which helps the customer service representative narrow down the scope of a search. If the search is too broad, you will produce many unrelated files that could lead to difficult questions. A user can conduct a word search through your database based upon the content of the verbatim field. Not all free-text fields may be searchable, depending on your system. Each field should be defined for your CSRs. The fields need to be used in the same manner by each representative. Inconsistencies in documentation can lead to questions regarding data quality. Clearly define acronyms and abbreviations in consumer files. The "notes" window in your CSR file is the appropriate place to document the details of an incident. Keep your verbatim short, since it only needs to reflect the root cause of an incident. Probe the consumer to find out what it was that prompted him or her to call. Try not to communicate with other CSRs using the verbatim field. This can happen when an escalated situation requires that a file be transferred from one person to another within the response center. The verbatim field should not

lead the reader to other parts of the CSR file. This could lead a legal investigation to request complete files, rather than just the report for related complaints.

The ROI on Fulfillment

Toni Houck, Coors Brewing; Linda Dickert Walsh, Dreyer's & Edy's Grand Ice Cream; Shelley Elkins, Estee Lauder Companies; Rita Van Boven, Novartis/Gerber; Richard Shapiro, Center for Client Retention

Approximately half of all consumers who receive a fulfillment item of value are delighted with their overall interaction. This compares to less than 25 percent of those who do not. Consumer affairs can increase brand loyalty by empowering their representatives to assist consumers with products that may no longer be available in the marketplace. It is important to learn if your department's fulfillment policies are being perceived as generous from your consumers' perspective. Technology to send electronic coupons is currently available. Testing the advantages of electronic versus paper coupons is presently underway and the results are impacted by variables, such as retail policies, etc. Automatic address searches provide many benefits, including improved productivity, increased accuracy and enhanced validation of data.

Reducing Stress and Turnover

Jim Moore, Hewlett-Packard; John White, HeartMath

- The increasing complexity of contact center technology is increasing the stress levels of contact center agents and managers, which is causing increased attrition, poor call quality and reduced staff and customer loyalty.
- Stress can be managed and harnessed for dramatic increases in productivity and reduced costs.
- Key performance indicators improve significantly and a great return on investment is the result. The climate and culture of the contact center can then foster optimum staff and customer loyalty.

Web-Based System for Tracking Foreign Materials

Maxine Weber, Pinnacle Foods

- Foreign material tracking and reporting is a critical consumer affairs process for most food manufacturers.
- Have you assessed whether Internet technology can help your company's tracking and reporting become more efficient? Your IT department may be a great ally! Many IT departments are looking for more Web-based solutions for their customers.
- Web-based reporting has many advantages including efficiency, timeliness and reducing complexity.

Measuring Employee Commitment

Bill Fonvielle, Performance Measurement Associates; Marcie Seyfarth, DaimlerChrysler

In an employee survey, focus on employee commitment rather than employee satisfaction. The questions in an employee survey should be based on employees' expectations of the employer rather than what senior managers think. The best frame of reference for scoring the employee survey should be internal to the organization and not based on the scores of other companies. Case study: There was a three-way collaboration with DaimlerChrysler Services Truck Finance, Advantage Performance Group and Performance Measurement Associates, Inc. The background was that there was a new leader in the midst of economic turnaround. There was an indifferent record with employee surveys and an introduction of a "balanced strategy." The questionnaire given to employees had four sections. It covered the expectations of the organization, expectations of the immediate supervisor, commitment outcomes, desirability of Truck Finance as a place of employment and an open-ended section. The first two sections asked for extent of performance as an ideal, minimally acceptable and actual expectations. The difference with the DaimlerChrysler survey from other employee surveys was the survey system, customized content, employee-centric, high response rates, employee commitment, employee expectations frame of reference, lots of visuals and clear improvement priorities.

Service From a Six Sigma Point-of-View

Kristy Bolen and Hollie Fineman, Carlson Worldwide

Use the DMAIC model – Define, Measure, Analyze, Improve, Control – to understand the voice of the customer and to measure satisfaction. The more time it takes to resolve a customer service issue increases the amount of compensation and decreases customer satisfaction. Empowering employees to take care of customer service issues engages both employees and customers in the resolution process. The concept of customer service at many hotels is downplayed on a consistent basis, ultimately preventing the increase in customer loyalty. Customer service issues can take anywhere from immediate resolution to over four weeks to resolve. This results in a range of guest reactions from mildly annoyed to lost customers and revenues. Project objectives generate proactive issue resolution on property. They save hotels time and labor, decrease average days to close, increase in customer satisfaction, increase in revenue generation, decrease compensation amounts and decrease customer service labor costs. Measure output by return guests – incremental value, financial and non-financial compensation and administration fees. Measure processes by the average days to close. Measure input by re-opened/adjusted issues, one-stop issues and hotel resolution issues. Measure statistics by average days to close, re-opened issues and average compensation per issue. An amazing 95 percent of customers who complain will conduct business with you again if their problem is resolved quickly (first call or visit). They will tell an average of five or more individuals. Encouraging unhappy guests to complain increases the probability that they will do business with your company again from 30 to 50 percent. Listen and promise to look into the matter and that probability goes to 72 percent. If your company does resolve the problem to the guest's satisfaction, the guest will be more loyal than if he/she didn't have the problem in the first place. Control the guest communication manager system reports with average days to close, administration fees and by the number of guests contacting the hotel. Also control with guest

satisfaction surveys and compensation per issue. The results are customer satisfaction. Ninety-nine percent of the guests surveyed were possibly or definitely loyal to the brand. Average compensation per issue decreased, and the average days to close decreased as well. In conclusion, effective courses of action were: pilot testing with properly buy-in/understanding, empowerment, customer service empowered to resolve an issue on the first contact, job satisfaction with fewer follow-ups and employee engagement and compensation hierarchy with a letter of return option and compensation based on the voice of the customer.

Empowering for a Star Quality Front-Line
Shelley Elkins, Estee Lauder

Shine and inspire: Start with you and create shining stars. Lead as you would be led, choose your response and act upon those actions. Make the connections and personalize work – people matter. Establish relationships all around you. Be sure to open doors, express extreme care, engage and collaborate. Make an impact. Set the expectations with an honest message that is consistent and clear. Create team values and a mission with team and leader involvement and commit to the team and the goals and values. Believe completely in yourself and your team. Communicate! Praise often and keep doors open. Tell the whole truth – both good and bad. Laugh and make your presence known. Visualize a boomerang. Be careful what you throw, because it will come back to you. Be clear, honest, fun, empowering, trusting and positive. The result is a shining star!

Becoming a Call Center of Choice
Jeff Doran, Contact Center Employer of Choice

Your employees are the most important part of your contact center and should be recognized. Management needs to develop and maintain the contact center as a people-friendly workplace to attract, retain and engage the best employees. Recognizing the contact center separately from the rest of the organization validates claims of being a preferred employer and helps create a common purpose culture. The skilled agent labor pool is drying up. The next generations of employees are loyal to themselves, not the organization. Call center jobs are still viewed as “entry level.” New employees are looking for training and development – if they don’t get that, they leave. Employees don’t want to burn out. Some of the human resource trends are the caring organization, enlightened management/leadership, the retired employee pool, the new grads pool, retention versus talent flow, Generation X versus Generation Y, dispersed workforce, work/life balance. The average turnover in Canada was 20.4 percent in 2001. There were higher turnover rates in centers that were smaller, paid less and offered fewer or no benefits. Turnover costs a fortune – replacement of an employee in a 200 agent contact center with an annual agent salary of \$30,000 are \$10,000 per person. Contact Center Employer of Choice’s statistics revealed that the highest scoring items were the main areas of agent satisfaction, such as easily accessible by public transportation, provides up to date technology, continually strives for customer service excellence, is known for providing excellent customer service, provides the employee with all the tools necessary to deliver

excellent customer service. The lowest scoring items were the main areas of agent dissatisfaction, such as effectively helps the employee deal with stress, conducts regular ESAT surveys, provides motivation incentives and bonuses, involves employees in decision making and proactively introduces development programs and succession plans. Most employees are not looking for a job outside the organization. Create a utopian contact center environment. When people think of the best call centers to work for, they should think of your company. Value employees as individuals and recognize their contribution to the organization – not just an FTE! The goals are to create a sustainable contact center employer of choice. To achieve that, you need to create a place that encourages people to care about their fellow workers, their job, the company and the future; attract, retain and engage great employees; create a real work/life balance. Follow the three stages in order to create this goal. The first is to create discussion and feedback sessions, such as focus groups and one on one interview with executives, managers and support personnel. The next phase is to review the top five scores and the bottom five scores and prioritize the highest ROI activities. Develop teams, accountabilities and timelines while using the right resources to drive positive change. Remember that the five critical elements of success are to assess, develop, maintain, adapt and promote.

How Exhibitors Can Move More Prospects Closer to Buying **Kare Anderson**

The essential message that exhibitors need to promote is to identify their buying mode. Passers by are in one of three buying modes: seeking information to buy a certain kind of product for the first time and trying to select the best product; considering changing vendors if they find a better product; trolling (not buying now but seeing what is new for future reference, or without the need or budget and will never buy). Serious buyers most want to see and hear information regarding the main reason to buy and if they should decide to do so, why they should buy from you instead of your competitors. Attendees rarely see or hear the exhibitor's main benefit, because there is too much detail to view in the clutter of an unfamiliar tradeshow. Exhibitors and promotion materials are inadvertently your biggest benefit. Often, features are promoted more heavily than benefits. This is not customer-centered marketing. The prospect has to do more work to make a fair comparison. Offer specific and easy-to-follow comparison sheets that do not insult the competition. Offer a comparison sheet that will provide details. Put a human face on the facts by providing customers situational examples to illustrate the benefits. Here are 23 ways to attract serious buyers to your exhibit:

1. Draft and memorize a sentence that explains your "differentiating benefit" without degrading your competitors.
2. Start with a specific benefit instead of building up to it.
3. Multiply attendees' positive exposures to your benefit in everything you say, display, point at, stand near or offer.
4. Be able to reduce that benefit to its essence in one vivid phrase, motto, slogan or sentence.
5. Make your phrase interesting and brief so the attendee feels in charge.
6. Offer "real life" situation examples.

7. Give no more than three supportive benefits.
 8. Express each supportive benefit, like a billboard message of five to eight words.
 9. Use every-day, non-jargon and non-industry-specific language
 10. The most credible proof of your benefits are third-party endorsements of three diverse customers who have little else in common other than their adoration of your product and company.
 11. Display a satisfied client's quotes under benefit on the booth and the promotional material – preferably each in a different color and typeface.
 12. Remove all graphics, words and materials in the booth that do not relate to either the main message or supportive benefits.
 13. Display your main point and supportive points on the booth above the heads of the staff and attendees, so the view is not blocked.
 14. Booth visuals and words should not guide attendees' eyes down a "path" from one message to the next.
 15. Avoid opening references to weather, freebies, drawings or other non-benefit related topics that distract and dilute your relationship with your prospect.
 16. Verbally and visually make a "conference offer," more information, a time-limited or bundled product order price, consultation or other vivid benefit to move them closer to the sale.
 17. An attendee's attention span is shortened if you wear patterned or very busy clothing or accessories (pin, necklace, tie, earring, etc.) or other busy "body signage," especially on the upper half of your body.
 18. For those who know your product, hand that person a gift for taking time to answering questions for you. Then ask, "What do you like best about our product/service?" Be a complete and supportive listener as they explain. Ask them to elaborate on their answers. The result is that you have moved them closer to a sale and voluntarily telling others about your service/product.
 19. When you first meet a prospect, find the quality in them you can most like and admire and keep it uppermost in your mind when you talk to them.
 20. When you stand opposite of someone, you are most likely to literally oppose them. Instead, "sidle," which is standing side by side, whenever possible.
 21. Get people to remember what you say, by saying your main points while you are in motion (turning, shaking hands, pointing at something, etc.). Relate your benefits to their three "core of life" experiences: family, place of employment, or where they live/have lived.
 22. To maintain rapport, use specific, emotion-laden language when stating the positive and report the negative neutrally.
 23. Begin your comments with a direct response to the prospect's last comment until they feel heard instead of working up to your response with other background information they may not want to hear.
- Continuously nurture your best prospects, seeding in their minds your main differentiating benefit and providing ideas and help at "non-sale" times. Make every aspect of your behavior, booth and promotional material repeat, reflect and reinforce that benefit before, during and right after the conference.

Tuesday, April 27

Tactics to Predict Consumer Trends and Effectively Address Them

Phil Lempert, Supermarket Guru

- Predict consumer trends and use them to market your brand.
- Using demographics and psychographics will affect your business.
- The consumer changes rapidly, and so do the top trends effecting their lives and purchase behavior.
- Your customers are changing every day, and with it the brands and stores they shop.
- A new marketing mix has replaced the four P's with a matrix of thousands of elements and the need for a new marketing plan.
- Target marketing by lifestyle and building relationships have become the new foundations for consumer marketing.
- The move from a broad consumer base to customer segmentation has created this need for a more in-depth understanding of behaviors and needs.

Beyond CRM: Letting Your Customers Manage the Relationship Through Redefinition and Empowerment

Fred Newell, Author

Recently, 74 percent of US businesses increased spending on CRM. A majority of these increases were from 25 to 50 percent. Of these businesses, 52 percent rate CRM the highest business priority. In Europe, a recent study showed 67 percent of respondent companies launched a CRM initiative in the past few years, and over one third consider CRM a top priority. However, it is impossible to hear a common definition of CRM from industry experts. Marketing automation, selling efficiencies and value maximization is not about the customer. Most benefits claimed for CRM are really benefits that accrue to the enterprise, but have nothing to do with the customer. Total customer relationship management is the optimization of all customer contact to keep customers coming back. A business strategy, which proactively builds a bias or preference with customer, results in increased performance and increased retention of best customers. It must be a continuing process – a dedicated, enterprise-wide effort, driven from the top and embraced by everyone at every level of the company. It is not just about having better customer information and being able to offer new services. It is about personalizing the transaction. The customer should be known everywhere - over the phone, on the Internet or visiting the business location. CRM excellence won't come overnight. But CRM strategy does begin to register increased retention of best customers and increased cross-sell on the short term. The average supermarket loses 25 to 50 percent of customers every year. Over 180 million customer affiliations are at risk or broken in the US every year. Going from 20 percent of a customer's purchases to 30 can mean as much as a 50 percent profit improvement. One Canadian grocery chain learned that selling one more produce item to every customer would increase profitability by more than 40 percent. New technologies have given greater power and freedom to customers. You no longer drive the communication; it's the customer who wields the power. We have to give the power to the customer. The time has passed for CRM:

customer relationship management. It is time for customers to manage relationships (CMR). CMR is all about finding out what your customers really want and how they want you to communicate with them. The five stages of implementation are:

1. Assign individual customer portfolios to individual customer representatives
2. Define different service levels for different customers
3. Develop real-time customer information tools to enable the reps to interact with their customers to improve the customer experience
4. Create goals and budgets by customer portfolio instead of by product
5. Communicate the strategy to the enterprise.

CMR is all about finding out what your customers really want. Relationship marketing can work if we let the customers manage the relationship to make things more convenient for them. The eight steps to CMR success are:

1. Think differently
2. Establish a benchmark
3. Define measurable goals and objectives
4. Create the strategy
5. Re-engineer the processes
6. Get ready for change
7. Keep technology in its place
8. Select the right tools

CMR is about empowering the customer. Above all, realize it is a new way of looking at the profitability of your company, a new way of looking at customer, marketing, information and strategy. It starts with new thinking, new questions, new evaluations of customers and new metrics.

Beyond Charisma: Becoming Positively Likeable and Unforgettable
Kare Anderson, Author

Practice behaviors that inspire happier, higher performance in others:

- First, bring out their better side so they instinctively see yours
- Spiral up into camaraderie rather than down into conflict
- Make differences a mutual benefit

Become an unforgettable face of your group, profession and company:

- Know that what is not revealed is often most revealing
- Become the glue that bonds people together

Be more than a problem-solver, become an opportunity-maker:

- See the bigger picture
- Bring unexpected expertise to the table
- Cultivate unlikely allies, inside and outside your organization
- Forge smart partnerships to generate extra value and visibility

Ask yourself strategic questions that hone your strengths, prioritize time and characterize your group's value:

- What is your group's single greatest asset for your company?
- What is your single greatest asset for your group?
- How does your group's brand reinforce your company?
- How does your personal brand reinforce your company?

- What is the bonus asset you bring to the group?
- Beyond charisma: demonstrate value in today's economy:

- Past
- Manufacturing Economy
- Information Economy
- Service Economy
- Experience Economy
- Attention Economy
- Support Economy
- Partnering Economy
- Future

Getting CSRs to Buy-In to Quality Initiatives
Barry Hudson, National Education Association

- Include your CSRs in defining quality for your department or organization.
- Use incentive programs to encourage compliance.
- Include customer feedback as a part of your CSR evaluation process.

PDA and Wireless Tools for Professionals
Corbin Ball, Author

In mobile technology, there are three converging trends: broadband wireless Internet, PDAs and handheld applications, cell phones and convergence.

- Broadband Wireless Internet
 - Wireless Fidelity (Wi-Fi)
 - 100' (30 m) in range
 - Fast 11 Mbps
 - 802.11g coming (54 Mb/s)
 - By 2005, more than 80 percent of professional notebook PCs will have built in Wi-Fi, approximately 88.3 million Wi-Fi-equipped computers.
- High bandwidth wireless
 - Bluetooth
 - 1-Mb performance over short distances
 - Range: 30' (10m) or less New UWB. 500MBs+
- Radio frequency identification
- WIDGET (wireless, Internet device for ge positioning, e-commerce and telecommunications)
 - Telephone
 - Geopositioner
 - Micro payments
 - Video camera
 - Still camera
 - Walkman
 - Web browser

- Pager
- Scheduler
- Contact manager
- Email manager
- Photo album
- Multimedia projector

Building a Business Plan for Cross-Functional CRM
Brett LaDove, LaDove Associates

The key opportunity in managing relationships is working with or leading cross-functional relationship building efforts. Build a case for CRM. A champion is a visionary, evangelist and strong advocate for the work; sees the need for the work and serves as a catalyst, raises awareness about the project effort; provides a sense of energy and passion about the work; demonstrates why the work is important; builds support for the cause; helps clear the path ahead. Building customer relationships is a long-term business strategy, not an event. CRM is not a silver bullet, other business challenges still matter. Improve technical interoperability. Relationships are built on the customers' timetable. The business case is a tool for champions. The key elements are situation analysis, vision and plan and financial model.

- Situation Analysis
 - Input consumer analysis and business discovery, output SWOT analysis, current picture of data flow, process maps and organization.
 - Consumer Analysis:
 - Mining existing data
 - Research
 - Informal assessment
 - Business Discovery:
 - Survey the business. Who's doing something interactive?
 - Target marketing
 - Promotions
 - Customer service
 - Web marketing
 - Kiosk
 - In store
 - The interview:
 - What are you communicating to customers?
 - What data source are you using?
 - What data are you capturing?
 - Where are you storing that data?
 - How is the data being utilized?
 - Who's doing what? What are you measuring?
 - SWOT
 - Evaluate the situation:
 - Services
 - Data capture

- Data usage/maintenance
 - Messages
 - Leverage
 - Data/Process/Organization:
 - Paint the picture
- Vision and Plan
 - Vision: describe the “end state” (three to five years in advance)
 - Plan highlights
 - Objective
 - Metrics
 - Key initiative and activities
 - Process
 - Technology
 - Organization implications
 - Timeline
 - Finances
 - Planning
 - Set objectives
 - Address strengths, weaknesses, opportunities and threats (SWOT)
 - Strategy
 - How you’re going to achieve your objectives
 - Prioritize (rationale for prioritization)
 - Phases
 - Metrics
 - Know the hot buttons, link macro business strategies
 - Data/Process/Organization
 - Paint the picture
- Financial Analysis
 - Financials
 - Cash flow
 - Proposed
 - Business as usual
 - Payback period
 - ROI
 - Assessing the costs/savings
 - Knowing what to measure
 - Establishing a value to those measures
 - ROI calculation
 - $ROI = (Gains - Cost) / Cost$
 - How do expected returns compare to cost
 - Net present value
 - Internal rate of return

Next steps are to propose, re-tool and gain approval. Developing a compelling business case requires a basic understanding of operations, planning, technology and finance, but you don’t need to be an expert in each.

Up-Selling and Cross-Selling Strategies

David Curtin, TVMAX

- Develop the most straightforward and engaging campaigns for your CSRs to present and your customers to understand.
- Make it exciting and easy for your customers to upgrade and expand with your services and make it worthwhile for your CSRs to sell.

Conflict Resolution Tactics

Kare Anderson

1. First, you need to know yourself. Find your hot buttons, sense your blind spots and focus on your compensating and calming behaviors. Remind yourself of your natural strengths in building credibility, trust and buy-in. Know that your greatest weaknesses are the flip side of your biggest strengths.
2. See others more clearly, their way. Look to their positive intent, especially when they appear to have none. People are far more revealing by the questions they ask than the answers they give. Look for changes in their usual behavior. How can you assuage their biggest unspoken fear? Who and what do they most value about themselves and in others?
3. Keep cool while under fire. Lighten up! When others begin to act “hot,” we instinctively either escalate or withdraw. Instead, slow everything down: your voice level, rate and the amount and frequency of your body motions. Acknowledge that you heard the person. Ask for more information so you both can cool off more and you can find some common ground based on her or his underlying concerns or needs. Ask your own. Say: “May I tell you my perspective?” This sets them up to give you permission to state your view. Presume innocence. Nobody wants to be told they are wrong. Whenever you have reason to believe someone is lying or not making sense, you will not build rapport by pointing it out to them. Allow them to save face and keep asking questions. Look to their positive intent, especially when they appear to have none. Our instincts are to look for ways we are right and others are less right. In arguing, as the momentum builds, we mentally focus on the thoughtful and “right” things we are doing, while obsessing about the thoughtless and otherwise wrong things the other person is doing. Try staying mindful of your worst side and their best side. It is your best chance of finding a path to reconciliation. Dump their stuff back in their lap. If someone is verbally dumping on you, do not interrupt, counter or attack in midstream. You will only prolong and intensify that person’s comments. When he or she is finished, ask, “Is there anything else you want to add?” Then say, “What would make this situation better for both of us?”
4. Tips to reaching agreements that stick. The triangle toward agreement is you, us and me. Don’t assume they readily see the picture you are presenting. Do not presume the person recognizes the benefits of what you’re proposing. Take time to vividly describe benefits in their language, related to their side of the situation, referring to their best side. Don’t push for closure when they are still escalating. When considering how fast to move in making a suggestion, lean toward moving

slower, especially at first. Ask the other person to propose a way to resolve the conflict. It is only human that one will put more effort into proving that his or her solution is workable, than he or she will instinctively find a way to prove that someone else's idea is the best one. Simply ask the other person for advice, "What would make it better for both of us?" Have a main spokesperson. Walk your talk. Find ways to reflect your values in how you approach work and your personal life. Your mission provides daily context and boundaries. Be present. Keep grounded and involved in what is happening right now, what is being said at the moment, glancing to the past and future only for context and balance. Consider how you say what you say. Consider their perspective in how you make any request. Make and keep arguments. In an often-unpredictable world, you build an "emotional deposit" of trust when your words and actions aren't contradictory. Then when you make mistakes, they have built up a level of trust to help them forgive your lapse. Have a larger vision of yourself – your best side – as your reference point for making daily choices. Establish your central life purpose and core value and let your actions reflect them. Your choices are much easier to make, you will inspire loyalty and attract others to act out their best side when around you. Take the high road. Have a core set of values and a vision of your service and role in your life – relate your vision to the mission of your organization, your role among family and friends and your actions in reaching agreements. Show them the positive longer view. Many seemingly foolish disagreements and negotiations are simply acting to prevent looking foolish later on. The best peacemakers work hardest to allay the other person's worries first. Look for the real source of the anger. When someone is angry with you, consider that she may be upset with themselves before you respond. Problems seldom exist at the level at which they are discussed. When you are involved in any argument lasting more than ten minutes, ask yourself: "Are we arguing about what our disagreement is really about or is there a deeper conflict not being discussed?" Remember, in any situation, you only have three choices: change how you are acting in the situation, accept the situation or leave the situation. The sooner you make a choice, the less stress and more options you will have.

We Hire Machines... They Do the Job Just Fine
Barry Bedrosian, New York State Public Service Commission

The Commission regulates the state's electric, gas, steam, telecommunications and water utilities as well as oversees the cable television industry. The department is the staff arm of the Public Service Commission. The Department of Public Service has a broad mandate to ensure that all New Yorkers have access to reliable and low-cost utility services. It also handles consumer education, residential advocacy and complaint handling, which includes initial stage, informal hearing and formal appeal. The OCS was created in 1981, it was a merger of three consumer service groups. It unified the database in 1984 through paper/delayed entry and real-time data entry. The first ACD was in 1985 with a staff of 50 people. The second one was created in 1994, and it was considered the first real one. The first real ACD was virtual and served Albany and New York City. It moved from regional handling to skill-based. Over-flow feature helped

control queues. Real-time and on-demand historical reporting, call control with multiple announcement, banner boxes synchronized between cities and the ability to change call processing to on-demand were all features of this new ACD. The first problem was too many calls. The solution was to develop an IVR. The study of incoming calls revealed that the name “public service” was misleading. Utility companies print PSC number bigger than their own and PSC is toll-free. Many calls were for simple, repetitive information. Many calls were not ready for PSC complaint process. An IVR handled more calls with less people. IVR design delivers clear, upfront info on what the PSC does, utility customer service numbers, answers to frequently asked questions, info on steps to take before a complaint, filtering of non-jurisdiction calls and fax-back complaint form/ mailing address. The next problem to conquer was that there were too many cases. The solution was to create self-help and automation options for the customers. Internet-based complaint form emails data to contact center and allowed for the ability for same day processing. It was no longer a database, but it was now real CRM – the 21st Century CRM delivered on time. LotusNotes-based CRM opens new doors. Two-year old backfill creates a history. Electronic imaging creates a “paperless” office. Scripted dialog for common/complex calls. Letters are created automatically. Complaint documents are created automatically. Full-featured CRM leaves little to the imagination. The next problem was that the cases were old. The result was that the staff required utilities to resolve problems. Twenty years of history tells the story. Most customer problems are satisfied by utility. Less than 20 percent require staff-directed resolution. Less than two percent go beyond the first step resolution. Timeliness is critical in satisfying customer. A 50 percent reduction in complaints equals a huge success. Service providers take ownership and staff introduces quick resolution systems. First customer contact is handled under QRS, and the service provider contacts the customer (two hours a day), maintains dialog with customer, and delivers resolution to the customer. They then report back to PSC within 14 days. There was a significant reduction in staff time to resolve and fewer complaints that required full investigation. The next step was to create a Web-based self-service. Phase one was included having the utility companies have secure access to database. Phase two included customer data entry directly into CRM. Processing time per case was reduced by 50 percent and the customer receives acknowledgement within 24 hours.

Nurturing Online Relationships

Corbin Ball, Author

There were only 130 websites in 1993, and now there are more than 10 billion unique pages. Almost 7.1 million pages are added each day. About 3 trillion emails were sent in North America in 2002. That’s 200 times more sent via email compared to pieces delivered by the US Postal service. That rate is expected to triple by 2006. Email marketing definition is using email as the method of retaining customers, acquiring new customers and driving sales. If it is done correctly, it is a highly effective method of promoting your business. If it is done incorrectly, it’s not just a loss of sales and revenue; it’s your business reputation on the line. The benefits to email are low in cost, high response rates (two percent to 70 percent), delivery can be timed to the minute, email campaigns are fully trackable, email will build your customer relationships. The top ten steps to effective marketing are:

1. Send only to those who have contacted you first:
 - a. Use an opt-in feature only; otherwise, it is considered spam.
 - b. Purchase lists cautiously.
2. Capture addresses:
 - a. You may do this through your website, snail mail forms or viral marketing
3. Personalize your email:
 - a. Capture the first and last name in the email, as well as interests and other profile characteristics.
4. Use text and html
5. Deliver your most important information first:
 - a. Example: key benefits and sales points.
6. Make the subject line your headline:
 - a. Make it strong, crisp and compelling
7. Short is better
 - a. For the weekly newsletter, make sure there are no more than five sections of three or less paragraphs each. For the monthly newsletter, it can be two to three times that amount. But a promo email must be much shorter.
8. Guard your subscribers' privacy
 - a. Don't sell your lists and post a clear privacy policy.
9. Push people to your site
 - a. Use your email as a teaser hyperlinked to more content at your site.
10. Provide valuable information
 - a. Customers will welcome the opportunity to receive last minute reminders, special offers, hot information about new products/services and news from the front-line of their industry.

Know how to be found on web search engines and directories. Submit your site to the website, such as google and Yahoo! Also create metatags, which is hidden HTML code in a web page that provides the site title, description and keywords. To be read off the web, focus no more than three main keywords or phrases. The content on the site should be a valuable resource for a topic. Offer uniqueness and something no one else has.

Coping With Difficult People and Strong Personalities
Marcia Doty, College of St. Scholastica

All of us deal with difficult people from time to time. Difficult behaviors include:

- Whiners: those who complain relentlessly out of a victim mind set, avoiding any hint of personal responsibility or problem solving.
- Snipers: those who attack when we least expect it or can least defend ourselves.
- Exploders: those who are calm one moment and explosive the next.
- Clams: those unresponsive people who shut down when a reasonable, relevant response is necessary to keep the relationship productive.
- Wet blankets: those negativists who dampen any suggestions, regardless of merit.
- Negativists: those who live by the adage "Sure, there's always a silver lining – and it inevitably attracts lightning."

Aggressiveness is that quality we see in people who attempt to shape the world, as they want it to be or believe it ought to be. People can be highly aggressive, yet caring. When hostility is coupled with aggressiveness, we experience pain and an imbalance in the relationship. Hostility is anger expressed with an intention to wound and leads to very abrasive behavior. Unresponsive people are those who clam up just at those times when you need an answer or want some more conversation. They respond by shutting down. Negative and complaining people have a deep-seated conviction that any task not in their own hands will fail. Because they believe that others in power are self-serving or don't care, their negative statements are made with strong conviction. Be alert to the potential, in yourself and others in your group, for being dragged down in despair by them.

Wednesday, April 28

A Different Approach to Call Center Logic: Friendliness Counts

Stephen Ruffin, McKee Foods

- Today's consumers are demanding more. It isn't enough in today's competitive market to simply provide what they expect. Give them what they want.
- Provide your customers with a positive experience that will enable them to identify and remember your company.
- After talking with your call center agent, your customer should be telling the next person they come into contact with "I just talked with the most interesting person." If they are not doing this, you are missing a golden opportunity.

We're All Different – and It's a Good Thing!

Marcia Doty, College of St. Scholastica

- Appreciate differences as gifts that enhance life rather than as irritations that build walls between you and others.
- Maintain a climate of collaboration that promotes respect, recognition and positive relationships.
- Gather information about unique perspectives in problem solving and decision making.