

Workforce & Performance: Nov 1 - 5

QA & Analytics: Nov 8 - 12

Best Practices in Workforce Optimization

**Virtual
Conference
2021**

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Welcome to the 2021 Best Practices in Workforce Optimization

Workforce and Performance Management – November 1 – 5

Keynote: Where Are We Going? Looking Into the Future of the Industry

Date: November 1, 12:00pm EST

Panelists: Todd Hixson, Hulu, Dan Smitley, World Travel Holdings, & Jason Persico, Wyndham Destinations

Event Number: 179 539 2802

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=eebb6e28bcd89fe30cad3a4a5d0778419>

Will bots be doing WFM in the future? Will we have Uber agents working from tablets and mobile devices while they catch Pokémon in between calls? Technology is changing seemingly at the speed of light. What do you need to be prepared for and thinking about to stay one step ahead, not just in WFM, but in partnering with an ever-changing workforce. A panel of leading industry veterans shares not only what they see in our future, but how they maintained “fresh space” to keep an eye on the prize while navigating the sea of change.



About Todd: Todd has around 20 years contact center management experience, working for Travelocity, Cabela’s & Intuit prior to joining Hulu. He has been an out-sourcer, in-sourcer and us-sourcer with a belief in efficiencies realized using creative scheduling, performance based “right for me” shift bidding, and pushing optimization limits while focusing on delighted customers & engaged employees. He has driven back-office practice, innovative skill based methodology (including social media) and cross functional “day in the life” workshops. His current projects include Omni-channel & creative WFM design. He has served on ICMI’s advisory board, consulted in industry standard definition and is a frequent industry speaker. Todd is an ICMI Lifetime Achievement Award winner (2018).



About Dan: Dan has been in the call center space for 15+ years and in WFM for 10+ years. Now with World Travel Holdings he is using his passion for employee engagement to improve the work from home environment that 99% of his agent community experiences. Most recently that passion has been directed at leveraging WFM to provide agents with schedule flexibility to empower them with the greatest amount of work/life balance while maintaining customer expectations.



About Jason: Jason is the Director of Workforce Optimization, Wyndham Destinations. He has 21 years of WFM experience in centers ranging from 100 to 4000 agents, with experience in financial, insurance, retail and hospitality sectors. He is also a SWPP Advisory Board Member.

Agent Well-Being and the Great Resignation

November 1, 2:00pm EST

Presenter: Dave Hoekstra, Product Evangelist, Calabrio

Event Number: 2347 082 1147

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e06c32c9327d3742d6420ec8f9c8a4a33>

One thing that has been resoundingly proven throughout the last 18 months — and has sustained from 2017 until now, in nearly every industry — is that nothing will short-circuit customer experiences faster than employee experience problems.

For contact centers, the age-old lesson is clearer than ever: The path to better CX starts with better EX. Putting the technologies and strategies in place to help your agents succeed will help you attract and retain the great people you need to deliver a stand-out CX. Join Dave Hoekstra in this session as he covers:

- **The Stress Crisis:** Why agent stress levels keep climbing
- **The Technology Tug-of-War:** Which technologies are helping agents — and where tech is still falling short
- **What Agents Want:** What drives long-term satisfaction — and what drives them to leave
- **What Flexibility Means Now:** Why remote and hybrid workers still want more flexibility



About Dave: When it comes to Contact Centers, Dave has seen it all. He started his journey in the 90's as an agent and continued through every role a contact center has to offer, eventually finding his way into his current role of Evangelist. Being Calabrio's Product Evangelist is by far the favorite of all his roles as it gives him the ability and pleasure of sharing his knowledge and experience with other folks in the industry. And yes, being a father, grandfather, bassist, podcast host and photographer (and Texan), he uses words like "folks". Combining 20+ years of experience in the industry with the rest of his life experience, Dave has a unique perspective of the tools, technology and challenges faced by today's modern CX organizations and he looks forward to each and every interaction.

A Panel Discussion on the Migration to Work-From-Home

November 2, 12:00pm Eastern

Presented by Jessica Harris, Workforce Manager, EPIQ, Kirwyn Adderley, Director, Workforce Management, Walgreens and Jennifer Waite, VP, Product Marketing, Playvox

Event Number: 2342 689 3238

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e6f40ccf6ed60146e1115f123abd7219d>

The last 18 months have brought many challenges, but the WFM effort of staff logistics has been a unique one. In our panel, we will discuss variances in migration processes and procedures factors such as performance metrics, attrition rates, schedule flexibility, and hiring and training processes. Pros and cons of at-home vs in-office logistics will be examined as well as various recommendations and conclusions from the panel members.



About Jessica: Jessica has over 20 years career experience, specializing in workforce optimization, outsourcing, technology modernization, project management, data analytics and business continuity. She was a finalist for the 2017 SWPP Workforce Management Professional of the Year.



About Kirwyn: Kirwyn Adderley has over 20+ years of operations and workforce management experience. He currently serves as the National Director of Workforce Management for Walgreens Centralized Services Site Operations Retail Central Operations. Kirwyn was the recipient of the 2014 Society of Workforce Planning Professionals (SWPP) Workforce Management Professional of the Year award.



About Jen: Jennifer has been in the customer experience and contact center industry for the past 30 years, focused on defining and implementing market strategies to support cloud contact center solutions market position, market segmentation, launch plans, and messaging. As a recognized leader in the industry, Jen has led customer advisory boards and serves as the co-president of the NY Metro chapter of the Professional Association for Customer Engagement (PACE). Her entrance into the contact center industry was a part-time job during high school which started a career that allowed her to work in consulting where she led creative design for implementing quality programs for Fortune 500 companies. As an evangelist for this industry, she enjoys sharing her experiences in hopes of creating the most effective and efficient customer interactions.

Workforce Management in the Digital World

November 2, 2:00pm Eastern

Presented by Paul Chance, Sr. Product Marketing Manager, NICE

Event Number: 2336 820 7082

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e6135113b3e4186dcaeb4304bee39ef15>

How people communicate is fundamentally transforming due to the rise in digital channels. These changes include how consumers interact with companies they choose to do business with. For the contact center, this means challenging long-standing assumptions about contact interactions, how they are measured, and how to handle the rigors of forecasting and scheduling in a digital channel-driven world.



About Paul: Paul is a 25+ year veteran of contact center technology and has spoken with contact centers in NA, EMEA and APAC about using technology to reach meet their service goals. He is an avid proponent of customer service and is the author of weekly thought leadership blogs on workforce management.

Digital First Engagement: Hiring and Planning to Meet the Rise in Digital Interactions

November 3, 12:00pm EST

Presented by Trudy Cannon, Director GTM Strategy, Workforce Engagement

Event Number 2338 687 4478

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=eb46e5a5f5557d255fcb96348c2e43899>

Customers have a higher expectation for digital engagement than they had a year ago. As a result, ensuring the right employee with the right skill set to handle these digital interactions is more critical than ever. Move beyond tactical planning by getting tips on how to infuse a digital strategy into your hiring and long-term planning practices.



About Trudy: Trudy is Verint's Director of GTM Strategy, supporting the Workforce Engagement Management suite including Workforce Management, Verint Monet, Performance Management, Quality Management and Engagement Data Management. In this capacity, she is responsible for driving go-to-market strategy, developing offerings, building tools, messaging, collateral, and sales enablement materials to support market growth. Trudy joined Verint in 2011 and has held the role of Application Consultant in the Services organization and Solution Consultant in Solution Sales supporting the WFE before joining the go-to-market team. Trudy has over 25 years of experience in contact center environments. Prior to joining Verint, she held management positions with the largest telecommunications provider, a multinational financial services corporation and a major airline.

Setting Strategic Goals for Workforce Management

November 3, 2:00pm EST

Presented by Maggie Klenke, Founding Partner, The Call Center School

Event ID 2344 253 6736

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e25ce35bfe1a0c813d9a4e245cc7b512c>

Just like the organization as a whole and the contact center within it, the Workforce Management department needs to have strategic goals that define the direction for the team. Clearly set overall goals make short-term decisions easier and performance more consistent. In this session, you will learn:

- The 10 most common goals.
- Definitions and applications.
- Implications of different calculations.
- Tradeoffs when goals create conflicts.
- The essentials of creating a strategic plan.



About Maggie: Maggie is an active industry consultant. She aids clients in development of strategic and tactical plans, technology applications and integration, staffing and scheduling, service level analysis, and overall management issues. Maggie teaches seminars on a wide variety of call center and telecommunications topics and is a popular speaker at industry conferences.

Innovative Ways to Schedule

November 4, 12:00pm EST

Presented by: Mark Rhodes, Senior Department Leader, Workforce Planning, Edward Jones and Rick Seeley

Event ID 2342 290 3076

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e7827af7c383a800c6241c554ceebd953>

Ever wonder what other companies have done to get the most out of their schedules using creative scheduling and flexibility? Come join this interactive panel where we share our success/failures, best practices, and tips and tricks for you to put your ideas into place. You will also have the opportunity to share some of your own creative options that you have implemented and your experiences. The panel will also look at how labor laws affect different states, nations, and geographies and how to effectively manage these challenges.



About Mark: Mark is currently the Senior Department Leader for Workforce Planning at Edward Jones. Prior to that he spent 13 years at Progressive Insurance where he held several different positions as a Workforce Management leader in the Claims and Service divisions. Mark has over 20 years of leadership and Workforce Management experience in Fortune 500 companies, and has a passion for automation and efficiency. Mark has a Bachelor of Arts degree in History from Miami University (Ohio) and is a Class “A” certified martial arts instructor in Kajukenpo Karate.



About Rick: Rick is an experienced Senior Manager with a demonstrated history of working in the outsourcing/offshoring industry for the past 32 years. He is highly skilled in Service Delivery, Operations Management, Coaching, Customer Relationship Management (CRM), and Customer Satisfaction. Rick is one of the original members of SWPP Board of Advisors.

Workforce and Performance Jeopardy

November 4, 2:00pm EST

Hosted by Vicki Herrell, Executive Director, SWPP and QATC: Panel includes Conference Sponsors

Event ID 2347 675 9663

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e9990c8167a67c9781914d905fcc96183>

Join this roundtable for a discussion of WFM and Performance Management by playing QA Jeopardy! Win Prizes.



About Vicki: Vicki serves as Executive Director of the SWPP and QATC, and oversees the strategic direction and the day-to-day operations of the associations. She brings to the position over 16 years of experience in the call center and WFM industry, serving for many years in the area of client relations and events management for the former TCS Management Group. She is the editor of SWPP’s On Target newsletter and the WFM Expert Solutions book.

Quality Assurance and Analytics – November 8 - 12

Keynote: QA Predictable Success: How to Establish Metrics That (Really) Matter

November 8, 12:00pm EST

Presented by: Justin Robbins Chief Evangelist at CX Effect | Customer Experience Analyst, Educator, & Executive Advisor

Event ID 179 995 3060

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e9bb3bdc290fb2a86a2946f161ee79a8e>

Did you ever sit back and realize that most of what you measure in your contact center is after the fact? Quality assurance evaluations on day-old customer interactions, dashboards showing averages from the past hour, and survey results from completed contacts. If you're like many contact centers, you're in a routine of reactive management. Something happens and you respond to it. It's better than nothing, but is it what's best for your business? Probably not.

In this session, we'll explore a better way for approaching how to define and measure contact center success. Discover ways to clarify what's most important to your contact center, how to define the metrics and indicators that better predict success, and ideas to engage and motivate employees in driving sustainable results. If you're tired of measuring the same things and expecting different results - this session is for you!



About Justin: Justin Robbins is the founder of JM Robbins & Associates, a US-based consulting firm that helps organizations maximize the strategic value of their customer experience initiatives. He is a customer service expert, professional speaker, and business consultant who's coached and consulted with thousands of individuals around the world on contact center and customer experience best practices. Today, Justin works with organizations to improve the impact of their performance management programs, drive more meaningful outcomes from their data, and align their customer experience teams from the executive office to the front line. He is a frequent author of industry research, articles, and best practice content, a professional member of the National Speakers Association and featured expert for mainstream media outlets including the New York Times, NBC Nightly News with Lester Holt, and Fox News.

Best Practices to Improve Agent Empathy

November 8, 2:00pm EST

Presented by Kelly Koelliker, Senior Director, Content Marketing, Verint

Event Number: 2349 850 9512

Event Registration:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=ec6aace41036baade7a07b7b1c82a58c7>

In a challenging customer service interaction, agent empathy can make the difference to retain or lose a customer. But is it possible to automate empathy? This webinar will cover three ways to use automation to improve agent empathy, including:

- Hiring empathic employees—how to measure it and improve it
- Analyzing interaction across channels to assess where more empathy is needed
- Using AI to provide real-time cues to encourage empathy when needed



About Kelly: Kelly is a Senior Director of Content Marketing at Verint with a focus on contact center workforce engagement solutions. With more than 20 years of marketing and sales experience, her expertise in the customer service industry covers such fast-evolving categories as knowledge management, natural language search, and CRM.

Best Practices for Real-Time Contact Center Process Improvement Yield Happy Teams and Customers

November 9, 12:00pm EST

Presenters: Donna Fluss, DMG Consulting and Dr. David Naylor, Humanotics and Kai Conversations

Event Number: 2334 294 4149

Registration Link:

<https://crmexchange.webex.com/crmexchange/onstage/g.php?MTID=ec1e9b5bac99df2e07f3e46044c474c>

The Pandemic has made customers think differently about their needs and wants, which has translated into new expectations that they want companies to meet. Adapting servicing strategies to address these new expectations will enable contact centers to deliver the best customer experience, efficiency, and growth.

Engaged front-line employees keeps customers happy and encourage loyalty. Transparency into the performance of frontline teams, accompanied by additional coaching and supervisory assistance is key to exceeding your customer expectations.

During this session sponsored by EvaluAgent, we will discuss how using an automated approach to quality management gives contact centers the ability to consistently measure agent performance, train their agents, enhance their skills, and optimize the handling of customer interactions in order to improve customer satisfaction and build employee engagement.



About Donna: For more than two decades she has helped emerging and established companies develop and deliver outstanding customer experiences. A recognized visionary, author and speaker, Donna drives strategic transformation and innovation throughout the services industry. She provides strategic and practical counsel for enterprises, solution providers and the investment community.



About David: Dr David Naylor has spent 25 years helping clients to build the best possible customer experiences. He has always believed that cutting edge technology and data insight are the enablers for this, but the real success is achieved through people. This is especially true today as organisations embark on a shift to highly configurable, commoditised, cloud solutions for customer service, such as natural language chatbots. The tools are now in the hands of the business, not IT, but there are a myriad of new skills required in these operations to make the most of the capabilities on offer. David runs two businesses. Humanotics' vision is to build Smart Contact Centres for clients by creating a seamless human-digital workforce. It brings the right talent and expertise together with cutting-edge technology applications in the areas of Conversation AI, Quality Management, Customer Insight and Robotic Process Automation. KAI Conversations, his other business, has developed the world's first facial, speech and text analytics solution for B2B customer service, sales and marketing via video interactions.

David gained a PhD in Artificial Intelligence in 1995 - long before it was cool! He has worked in Customer Management consulting and operational roles since then in the Europe, Australia, New Zealand, China and The Philippines. After many years delivering natural language and speech analytics solutions for clients, he is especially passionate about educating clients on the real capabilities of AI and Analytics to help them understand and communicate better with customers. He firmly believes that people are the essential ingredient of any technology deployment.

Creating a Flexible Quality Assurance Practice

November 9, 2:00pm EST

Presented by: Jim Kitterman, CCXP, Principal Strategic Consultant, Calabrio

Event Number: 2348 275 5965

Registration Link:

<https://crmexchange.webex.com/crmexchange/onstage/g.php?MTID=e577609de7a63b5e120c1aaa5ad4394d8>

Quality Assurance is not a product but a concept. An effective QA practice should be flexible and leverage Analytics to monitor and measure the right Key Performance Indicators (KPIs) for your organization to drive better customer experience, employee engagement and reduced operational costs.

In this session we will discuss the best practices for developing a QA practice that is not only flexible to evaluate and appropriately weight those factors that are unique to an industry, a company, or its culture, but will also scale through the use of Speech, Text and Desktop Analytics. We will also look at the most common contact center KPIs which can provide immediate benefits and how Analytics can be applied to improve both the agents' and the evaluators' performance.



About Jim: Jim has over 25 years' experience in sales and consulting in Voice of the Customer (VoC) and Customer Experience Management (CEM). He has worked with a variety of technologies designed to help businesses improve their customer's experiences advising several Fortune 500 companies, small organizations, government agencies and global system integrators. A particular area of focus has been on Customer Analytics Solutions including Text Analytics, Speech Analytics and Enterprise Feedback Management (surveys tools) measuring and identifying the root cause of Customer Satisfaction/Dissatisfaction, Loyalty, Level of Effort, Customer Journey Mapping and Employee Engagement. A graduate of Purdue University he lives in the Washington, DC area.

Engaging While Changing

November 10, 12:00pm EST

Presented by: Lauren Maschio, Sr. Product Marketing Manager, Quality, and Kim Steele, Solutions Engineer, NICE

Event ID 2339 516 9738

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e7ae6533c80cb36e454a99cb14f209d7b>

During the pandemic, many contact centers were challenged when it came to managing employee performance while many changes were taking place. The QA programs that played a significant role in motivating employees and guiding them during a time of change were able to quickly adapt to meet the needs of a new environment.

Join this session and learn how you can reshape your quality program to be ready make an impact both now and in the future.



About Lauren: Lauren has over 20 years of marketing leadership experience in the high technology industry with more than 10 of those years in the contact center market. As the manager of the Customer Engagement Analytics marketing team at NICE, Lauren is responsible for driving strategy and thought leadership, campaigns, and sales enablement. Prior to NICE, Lauren has held senior-level global marketing positions at VoltDelta, Process Software, Compaq (now HP), Bay Networks (now Nortel) and CrossComm.



About Kim: Kim has been working with contact centers for more than 20 years. Through various positions in training, quality, and business intelligence, Kim has a passion for partnering with contact centers to improve key metrics and agent performance. In the last 8 years with NICE, Kim has continued this pursuit by working with customers across different verticals to build highly functioning quality and analytics teams resulting in high return on technology investments.

Give Customers Instant Gratification Every Time - It's Possible

November 10, 2:00pm EST

Presented by: Mechele Herres, Sr. Product Marketing Manager, and Abby Monaco, Senior Product Marketing Manager, NICE CXone NICE CXone

Event ID: 2342 794 6612

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e33a0968f52f3c0f2997e7f72e5c6194c>

When customers engage a contact center, the one common denominator that every engagement shares is the demand for instant gratification. Whether it's resolving a problem, checking a balance, making an appointment or any other need; customers expect speed, efficiency and an agent they can relate to in every engagement on any channel, all while expending minimal effort.

Join this session to learn tips on how to deliver instant gratification.



About Mechele: Mechele is a Marketing/Sales Executive with experience in solution selling, training, product management, development and all facets of marketing. Passionate about internal and external customer relationships. Known for analyzing what is wrong, attacking unsolved problems and finding quick resolution to improve procedures through a collaborative approach. Driven to make a difference.



About Abby: Abby brings over 17 years of experience in product management and marketing direction in software and technology. She plays a key role in establishing as the market leader NICE's vision and messaging for its Customer Engagement Analytics solutions. She is in charge of articulating and promoting the value and competitive advantages of the Analytics and Customer Journey Solutions portfolio.

Democratizing Your Customer Data

November 11, 12:00pm Eastern

Presented by: Scott Kendrick, VP Strategy, CallMiner

Event Number 2332 236 2807

Registration Link:

<https://crmexchange.webex.com/crmxchange/onstage/g.php?MTID=ef2f955029bfc44e5b3970b778b2afcf1>

While many organizations like to claim that they're data-driven, many teams still operate on instinct. According to Gartner, most companies base more than half of their decisions on 'gut feelings'. What's preventing teams from making data-driven business decisions when they're awash in data?

A wealth of artificial intelligence (AI) and machine learning (ML) tools are available to collect and analyze data, but the barrier to entry is often too steep. What's more, many organizations collect data from their customer conversations that gets stuck in the contact center. While applications like improving agent performance are important, that data isn't being leveraged to drive business improvements. It's time that these business-impacting insights are made available to more people across your organization. It's time to 'democratize' your data, so that more concrete, measurable business changes can be made.

Join this session as we discuss the importance of taking a "walk-before-you-run" mentality in making performance improvements that impact your bottom line. Attendees will learn:

- What exactly "Democratizing Your Customer Data" means for your organization
- Solutions and tools the team needs to work on their own terms
- How to create a cultural shift within the organization that prioritizes data-driven decision-making



About Scott: Scott has 20 years of experience in software product management, design, and marketing for everything from shrink-wrap consumer applications to enterprise cloud solutions. He introduced the tagline "Listen to your customers – Improve your business" which is both something he passionately embraces in marketing and product management, and how he articulates the benefit CallMiner Eureka brings to market. Prior to CallMiner Scott was Sr. Director of Global Product Management at MIVA (an internet search marketing company), and Director of Product Management and Marketing for the New Ventures division at Corel Corporation (makers of personal and business software CorelDraw® and WordPerfect®). Scott holds a BScE in Civil Engineering from Queen's University (Ontario, Canada), and is certified in Pragmatic Marketing and SCRUM.

Coming Together as a Team

November 11, 2:00pm Eastern

Presented by: Heather Turbeville, Sr Marketing Manager, Authority Software, Michelle Chevalier, Customer Experience Coordinator, EquiTrust Life Insurance Company, and Hardy Whiteman, EquiTrust Life Insurance Company

Event ID: 2330 634 7724

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e26b0529cf77644b2e822772dcd6b6b64>

The reality is that quality monitoring may be met with resistance by agents, who may feel like the quality assurance team is looking for opportunities to catch someone not doing their job. This can easily create discontent and a lack of trust. Join this session as we discuss how to get agent buy-in along with solutions that will give your agents the confidence that everyone is on the same team and help agents understand the benefits and value associated with quality monitoring.



About Heather: As Senior Marketing Manager for Authority Software, Heather Turbeville is excited to help bring a full breadth of easy-to-use, quick to deploy, and fully configurable workforce optimization solutions to the contact center market. Heather has nearly 20 years of marketing, sales, and solutions experience in the contact center industry and has led global marketing programs at technology companies including Aspect Software, Altivon, Knoahsoft, and Performance Technology Partners. Heather has also been part of the public and analyst relations efforts at Fortune 500 companies including NetApp, Adaptec, and PriceWaterhouse Coopers.



About Michelle: Michelle has over 20 years in the finance, operations, quality improvement, training, business solution processing and customer service industry. She has focused on operations management, retention, client relations, quality improvement, employee relations, learning and development.



About Hardy: EquiTrust Life Insurance Company

QA and Analytics Jeopardy

November 12, 12:00 Eastern

Presented by: Conference Sponsors

Event ID 2330 517 4969

Registration Link:

<https://crmchange.webex.com/crmchange/onstage/g.php?MTID=e8c314290b0f956c08192d063f734e76f>

Join this roundtable for a discussion of QA and Analytics by playing QA Jeopardy! Win Prizes.