



THE *FUTURE*
CONTACT CENTER
SUMMIT



The Essentials of Customer Care

An eBook featuring 16 customer care executives who spoke at
Call Center Week

What's Inside

The Essentials of Customer Care eBook features 16 leading experts sharing their visions on the ideal customer service. Each of the contributors spoke at Call Center Week, our sister event in June. At [The Future Contact Center Summit](#), you'll engage with similar customer care leaders.

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Preview of What You'll Learn

"Never forget the value of your customer."

"This was a game changer for us."

"Invest in intelligent self-service solutions."

"Eat your own dog food!"

"Customer Service is not rocket science."

"Measure what matters to customers."

"We have a customer service culture driven by our passion for innovation."

"It's the experience stupid."

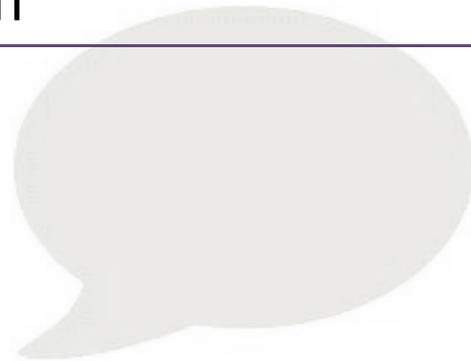
"Customers want to know how important they are to you."

"Associate satisfaction drives customer satisfaction."

"Customer service is the competitive advantage for all organizations."

"Make the customer journey enjoyable."

"Not only because it's good business, it's the right thing to do."



Thank You to Our Contributors

Hear more from experts like these at The Future Contact Center Summit

- **Deborah Alvord, Customer Engagement Management, Hewlett-Packard**
- **Jeremy Booth, AVP, Cambridge Investment Research**
- **Christopher Cardenas, VP, Customer Care, Time Warner Cable**
- **Kyle Cleaver, VP, Global Customer Care & Operations, CareerBuilder**
- **Leann Corabi, Sr. Manager, Operations Strategic Initiatives, Cars.com**
- **Joe Huffnagle, Sr. Director, Enterprise Systems, Medical Alert/Connect America**
- **Mary Beth Jenkins, COO, UPMC Health Plan**
- **Terry Lang, VP, Retail Customer Contact Center, National Operations Manager, Comerica Bank**
- **Amy Latzer, COO, 211 LA County**
- **Dr. James Merlino, Chief Experience Officer, Cleveland Clinic Foundation**
- **Christopher Mulligan, CEO, TalentKeepers**
- **Leslie Noffsinger, General Manager, Customer Service, Williams-Sonoma Inc.**
- **Mike Politz, SVP, Operations, Cross Country Home Services**
- **Heather Rattin, Director, Customer Care, Cars.com**
- **Niren Sirohi, VP, Predictive Analytics, Teletech**
- **Graham Tutton, VP, Customer Insights, Comcast**



15 Essential Customer Service Tips

Call Center Week speakers share their most insightful bits of “customer knowledge.”

1

We all know that without our customers we would not be in business, so we definitely owe our professional success in part to them; thus my advice to my peers would be “never forget the value of your customer.” Think about I.O.U.:

Important (make every effort to personalize interactions with customers)

Ownership (strive to make all interactions easy and effortless)

Urgency (empower your team to take action)

- Kyle Cleaver, VP, Global Customer Care & Operations,
CareerBuilder

2

Figure out what really matters to your customers before adjusting any goals or processes. This was a game changer for us, when we realized that certain things we were doing added no value or were missing in satisfaction. Our next effort is to calibrate our internal Quality Assurance metrics and scoring with the Customer Satisfaction data, to ensure we are training and coaching to what impacts the experience most.

- Heather Rattin, Director, Customer Care, **Cars.com**

3

While self-service online and automated support is a must have, many customers still prefer to be easily connected to a live CSR.

- Marybeth Jenkins, COO, **UPMC Health Plan**

4

Customers want to know how important they are to you. They want a "ma & pa" store feel no matter your size, shape, and influence. The quicker we all get to this, the better the consumer experience across the board.

- Joe Huffnagle, Sr. Director, Enterprise Systems, **Medical Alert/Connect America**

5

Know what's going on inside and outside of your organization. Day-to-day events, especially in a financial organization, can radically change the call volumes and customer information required at a much faster pace than ever before. Sensationalism in news around bank card compromises, data breaches and other news that questions the security of the banking system will immediately impact the customer's perception of the bank; whether the bank was involved or not. Being able to rapidly respond to these demand changes both from a consolidated communication and human capital standpoint is tantamount to maintaining customer's trust in the bank.

- Terry Lang, VP, Retail Customer Contact Center, National Operations Manager, **Comerica Bank**

6

Treat employees as volunteers and they'll treat customers the way in which you would like to be treated.

- Christopher Mulligan, CEO, **TalentKeepers**

7

You can have the greatest technology in the world...but without effective and efficient foundational processes in place, the technology will not bring nearly the value that it could, and you will not see the results that you expect.

- Deborah Alvord, Customer Engagement Management, **Hewlett-Packard**

8

Don't underestimate the power of intelligent self-service. Many customers call because they are unable to find self-service options. And many of those who call, in addition to resolving their immediate issue, are also trying to figure out how they can resolve their problems on their own the next time. Invest in intelligent self-service solutions which have become more amenable due to advances in technology enabled analytics.

- Niren Sirohi, VP, Predictive Analytics, **Teletech**

9

We should share the insight we have all gained from our experiences so others can learn and make similar or better decisions within their own firms. We can learn from each other's challenges and opportunities and inspire higher levels of creativity, critical thinking, and service across industries.

- Jeremy Booth, AVP, **Cambridge Investment Research**

10

Eat your own dog food! Call your own center, be a customer and learn what that feels like. Is it a great experience? Did you get what you needed? Did you get help? If you can be your own customer and have a great experience, then your company is living and breathing the gold standard.

- Amy Latzer, COO, **211 LA County**

11

Value is not just Quality and Price. It is heavily impacted by an entire organization and consists of varying elements within customer experiences, "risk" mitigation, emotional benefits/returns, consistency, among other items.

- Graham Tutton, VP, Customer Insights, **Comcast**

12

Customer Service is not rocket science and customer needs are no different from that of our own. Most customers just want someone to take the time to listen to their concern, empathize with the situation and resolve the issue the first time. Any organization that can master these three things will certainly provide first in class customer service.

- Christopher Cardenas, VP, Customer Care, **Time Warner Cable**

13

Great people = Great decisions = Constantly exceeding customer expectations.

Measure what matters to customers, not to you.

- Mike Politz, SVP, Operations, **Cross Country Home Services**

14

When it comes to a positive customer experience, communication is the fundamental building block. If this communication is positive, it will have a positive ripple effect on an organization's safety, quality, experience and value. Helping patients (our customers) have a good experience goes beyond "more smiling" by physicians or gimmicks that an appointment center could use to try to make them happier. High quality and safety flow from solid communication with everyone involved in a patient's care.

You have to pay attention to little things because at the end of the day, patients are human beings. They place their absolute trust in us. They put their lives in our hands. This occurs at their most vulnerable and often most frightening time of their lives. We have an absolute responsibility to care for them.

- Dr. James Merlino, Chief Experience Officer, **Cleveland Clinic Foundation**

Customer Service as a Competitive Advantage

Our experts share how their organizations ensure that customer service provides an important competitive advantage.



We like to think of Time Warner Cable Business Class as a customer service provider that just happens to offer cable products and services. We pride ourselves in the belief that every customer is important regardless of spend. Our belief is that authentic leadership promotes associate satisfaction, and associate satisfaction drives customer satisfaction. This philosophy is not only conducive to success in the workplace but also provides a differentiated customer experience.

- Christopher Cardenas, VP, Customer Care, Time Warner Cable

WILLIAMS-SONOMA

In today's retail market it is becoming less about what you sell and more about the experience. We know our product can be copied. We have big competitors out there like Target and Costco, but what customer really want is a "good experience". I have always wanted to put up a sign in my office that says, "It's the experience stupid".

- Leslie Noffsinger, GM, Customer Service, Williams-Sonoma Inc.



We are lucky at Cars.com to have the advantage of empowering our customer service representatives to use their best judgment in handling customer issues. We do not make our reps follow scripts and that shows in our customer satisfaction metrics and the open ended responses we receive in our contact center surveys.

- Leann Corabi, Sr. Manager, Operations Strategic Initiatives, Cars.com



Customer Service is a defining part of Comcast's Complete Customer Experience/Journey. Our goal is to provide world class service experiences (First Time Right, Easy to Do Business with, demonstrating Genuine Care, among others) through all channels, while giving customers control and choice as to how & when they interact with us. That said, we are extremely focused on minimizing the need (root cause) to contact us by improving reliability, functionality and clarity of our products, services, and bills.

- Graham Tutton, VP, Customer Insights, Comcast



Customer service isn't a competitive advantage for my organization, it is the competitive advantage for *all* organizations. Unless of course your product or service needs no servicing because of its sheer amazement. Then ignore this!

- Joe Huffnagle, Sr. Director, Enterprise Systems, Medical Alert/Connect America



Our organization truly believes that service excellence is a real differentiator and a competitive advantage.

Our service vision includes hiring trusted experts that are committed to assisting our customers. We always accept our customer's challenges as our own and our professionals are in the business of constantly creating more value for our customers and clients.

- Mike Politz, SVP, Operations, Cross Country Home Services



The product we support is a subscription product, so our customer service to keep customers accounts up to date and accurate is very important to ensure they are receiving a positive ROI. This is why we have continued to develop tactics, both large and small, to focus on exceeding goals for turnaround time, resolution and accuracy all which are important for our customers. We also are in an industry that is very competitive and there are many choices for our customers to spend their advertising dollars on, so focusing on the service we provide to them that help make our products work for them well, make it is an easy choice as to why us and not our competitors.

- Heather Rattin, Director, Customer Care, Cars.com



TalentKeepers sells intangibles such as employee retention and engagement, while we do use products in the course of delivering these results, it is our ability to understand our customers' needs and exceeding their expectations which makes us successful.

- Christopher Mulligan, CEO, TalentKeepers



2-1-1 is not just about information, it is about people. People who call 2-1-1 are in need of professional expertise delivered by someone with a big heart, and a willingness to listen and help. If they do not have a special customer experience, then they may not call the place that we refer them to and that could be a critical step in their ability to stabilize their situation.

- Amy Latzer, COO, 211 LA County



We have a best in class “sales force” that does a superior job of getting our clients to write big checks; however, it is the ability of our team to build relationships and minimize client issues that allow the company to cash those checks. The advantage of having a great servicing team is that they drive innovation through capturing the mind of the customer while creating partnerships that drive revenue through client retention.

- Kyle Cleaver, VP, Global Customer Care & Operations, CareerBuilder



Without [customer service], we aren’t competitive. We never lose sight of the need to improve the loyalty of our current customers while winning new customers. The contact center plays a key role in delivering customer service and impacting the overall customer experience.

- Deborah Alvord, Customer Engagement Management, Hewlett-Packard



Quite simply, our driving value is service. We believe in providing service excellence to all of our stakeholders and customers.

- Mary Beth Jenkins, COO, UPMC Health Plan



We define and deliver customer service for our clients globally. When interacting with our people, the customers of our clients experience the most critical moments of truth that form lasting perceptions about our client brands. By delivering exceptional customer service, we are differentiating our clients from their competitors in sustainable ways that create lasting competitive advantage.

- Niren Sirohi, VP, Predictive Analytics, Teletch



We start by thinking of patients as customers who are shopping and deciding what to purchase for their healthcare. They often have many choices of where to go for their treatment, which also means they can choose not to come here. And if they don't like the service they receive, have a bad experience when scheduling an appointment or hear stories about poor service from friends or family members, they will do just that.

One of Cleveland Clinic's advantages is our service philosophy of creating active partnerships with our patients and their families, from the moment they first contact us for an appointment, through their visit and care at our facilities and after they leave and return home. We involve them in many ways so we can take better care of them. For example, we educate them about the importance of hand washing, how to better communicate with their care teams and what questions to ask when they are receiving medications. Not only does this philosophy help protect our patients, but it also helps us set their expectations while allowing us to better understand what it's like to be a patient. In general, healthcare providers are always talking to patients about disease and treatment, but our industry doesn't spend much time talking to them about what it is actually like to be a patient and what they should expect when they're in our care. We aim to do all of those things, which sets us apart from many other organizations, and it all starts with the initial call for an appointment.

- Dr. James Merlino, Chief Experience Officer, Cleveland Clinic Foundation



Comerica Bank is a 165 year old institution that prides itself on the long-standing relationships it has built with both business and retail customers. Our customers rely on our bankers to know their business intimately and recommend products and services that best fit their needs. Retail customers experience customer-centric service from banking center colleagues and contact center colleagues alike. Through its customer service, the contact center has been recognized as the highest rated customer sales and service organization among its peer banks for the last 7 years. (O'Conner Survey)

- Terry Lang, VP, Retail Customer Contact Center, National Operations Manager, Comerica Bank



Cambridge is a leading independent broker-dealer in the financial services industry, and our services are key to our competitive positioning. Many products and offerings across the industry quickly become commoditized, and we believe a critical differentiator is in how products and offerings are delivered to clients. We have a customer service culture driven by our passion for innovation and grounded in core values of commitment, integrity, flexibility, and kindness.

- Jeremy Booth, AVP, Cambridge Investment Research

What Direction Should Customer Service Go?

Call Center Week speakers are customer service leaders. See which direction they want to push their organizations in the future.



I am trying to push Comerica toward integration of its various data stores so there is one homogenous customer service profile that is accessible to all customer facing tools used throughout the bank.

- Terry Lang, VP, Retail Customer Contact Center, National Operations Manager, **Comerica Bank**



We want to create fun and effortless experiences for our customers by developing easy and convenient ways to assist and educate customers, while making the customer journey enjoyable. No matter the channel the customer selects we want to ensure that all queries are dealt with competently, quickly and accurately with a certain “CareerBuilder Flair” as in Rick Flair (WOOOH).

- Kyle Cleaver, VP, Global Customer Care & Operations, **CareerBuilder**

I would really like to see our organization effectively deploy tiered levels of service based on a strategic customer segmentation plan. I think this is necessary for us to continue to provide the level of service necessary for our clients that are increasing share of wallet with Cars.com products but also scalable to continue to grow and apply the resources needed to make investing in customer service a profitable one.



- Heather Rattin, Director, Customer Care, **Cars.com**



The customer experience is the responsibility of every single touch point. Priority #1 of all functional areas is to serve our customers and exceed their expectations during every interaction.

- Christopher Cardenas, VP, Customer Care, **Time Warner Cable**

A key focus at the moment is successfully delivering a true omni-channel customer experience.

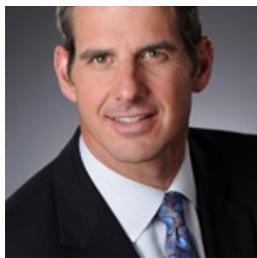


- Deborah Alvord, Customer Engagement Management, **Hewlett-Packard**



The direction I am actively pushing my organization towards is gamification, it is an amazing tool that is both internal and external facing must have for those who truly want results driven metrics.

- Joe Huffnagle, Sr. Director, Enterprise Systems, **Medical Alert/Connect America**



Cross Organizational accountability for CEx improvements. One of our key goals in 2014 and beyond is improving the end to end customer experience. We will accomplish this through direct improvements in Performance & Reliability, Value and Customer Service perceptions. To accomplish this, we are holding all internal departments accountable for linking their work output to impacts/improvements to Customer Satisfaction, plus operational and financial improvements.

- Graham Tutton, VP, Customer Insights, **Comcast**

We are constantly working to improve our culture. The right culture is needed to create the right experience. This is a journey that we recently embarked on. It takes time and buy in from all levels of the organization. We know that taking the next step to create even more value for our customers truly starts with culture.



- Mike Politz, SVP, Operations, **Cross Country Home Services**



Aligning the sales experience with the customer service experience. Sometimes retailers provide a Nordstrom sales experience but a Dollar Store customer service experience. Yes, you probably have noticed there is no returns area at the Dollar Store.

- Leslie Noffsinger, General Manager, Customer Service, **Williams-Sonoma Inc.**



We live by a “Patients First” mantra. This puts our patients front and center in everything we do – this extends to every function of every caregiver in every role at all our facilities. Along with living up to our promise of putting patients first, we also need to move away from thinking that patient experience is all about making patients happy. While our patients are always first, it doesn’t mean that they’re always right. This misses the point. Patient experience is also about the way a hospital delivers care.

Patient satisfaction metrics are important, and we should be very concerned about the how patients perceive the experience they receive. But patients must always understand that we will occasionally do things that are important for their safety, and we are willing to compromise their satisfaction to keep them safe. The key to a great patient experience, and putting Patients First, is simply ensuring that we treat our patients appropriately, beginning at the initial point of contact, and give them the care they need and deserve.

- Dr. James Merlino, Chief Experience Officer, **Cleveland Clinic Foundation**

Finding ways to be more efficient with our internal processes will enable us to reduce costs for our clients while leveraging best practices to maintain quality.



- Christopher Mulligan, CEO, **TalentKeepers**



I would like to see our organization be able to help a larger number of people through multiple channels. Reaching a deeper percentage of the population and creating continuum's of care that address complex social service needs is the direction we are heading.

- Amy Latzer, COO, **211 LA County**



I would like to see all departments in our organization take ownership on the contact center surveys we receive. Everyone needs to be engaged and understand that all decisions we make as a company touch our customers, regardless the size of the impact.

- Leann Corabi, Sr. Manager, Operations Strategic Initiatives, **Cars.com**



We are already on the best and strongest path for delivering the highest levels of service. But as our organization continues on a path of highly accelerated growth, including the increasing number of clients we serve and the teams of associates serving them, we are challenged to continually enhance our service model on all fronts. I personally have an eye on how to foster higher levels of empowerment for frontline associates that interact directly with customers because I believe that is a major contributor to customer satisfaction.

- Jeremy Booth, AVP, **Cambridge Investment Research**

Technology enabled analytics is the big white space for us. By being able to listen, interpret and act in superior ways during those critical moments of truth when our client's customers are interacting with the brand, we can create *lasting customer experiences*. Making that happen requires technology enabled analytics and we are hard at work on that.



- Niren Sirohi, VP, Predictive Analytics, **Teletech**



It is imperative that we continue to focus on "one call resolution" and exceeding our customer expectations. Not only because it's good business, it's the right thing to do.

- Mary Beth Jenkins, COO, **UPMC Health Plan**

Why You Should Attend The Future Contact Center Summit

Last year's [Summit](#) was the biggest in the event's 10 year history. For our 10th Anniversary, we're expecting 650+ attendees to take part in 5 days of workshops, site tours, networking sessions, panel discussions and case studies.

This year's conference + expo will be held **January 26-30 at the Omni Orlando Resort, ChampionsGate**. For more information, please visit TheFutureContactCenterSummit.com and download [the brochure](#). You can also reach us at enquiry@iqpc.com or 1-800-882-8684.



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We hope you enjoyed this content and we look forward to seeing you once again at the Summit!

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