



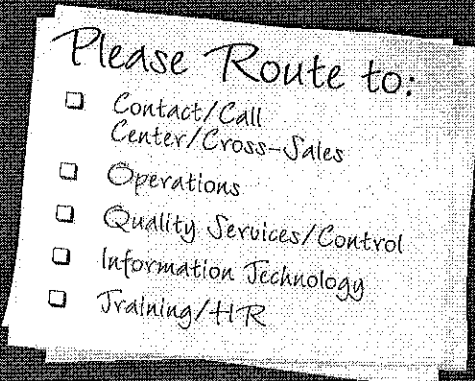
Call Center Management for Financial Services

Innovative Strategies to Optimize Quality & Reduce Risk

October 22nd - 24th, 2007 • Millennium Knickerbocker Hotel • Chicago, IL

Develop and elevate solid expertise and learn how to:

- Deliver extraordinary quality through workforce management, training and agent retention
- Measure your call center quality and customer expectations and report your results for paramount decision making
- Implement advanced technology and industry trends into your call center process
- Integrate compliance and customer protection policies in your process to build "customer trust"
- Learn best strategies for outsourcing call center operations



- Integrating Compliance and Security Management Procedures into Your Financial Call Center Process to Avoid Litigations
- Managing the Transition from Service Focus to Sales and Service Focus in a Financial Contact Center
- Using Positive Coaching to Maximize Financial Service Quality
- Maximizing KPIs Through Improved Retention: 10 Ways to Cut Agent Turnover

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Case Study: Hear recent developments and practices post-Merrill NASD action

Featuring
Industry Experts

UBS Michael Bouhuys, Global IP Call Center Engineer, "Using VoIP to Increase Your Business Flexibility in Today's Volatile Environment"

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American National Insurance
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Malecki Law
Esq.

Liberty Mutual Group
Director IP Systems

Davis and Henderson
Director of Business Services

Nationwide
Claims Call Center Manager

BMW Financial Services
Cross Sell Manager



The first twenty registrants receive a **Free Copy** of The Positive Coach Approach by Sally Cordova and Judy McKee

Register by August 24th and save up to \$900

Pre-Conference Workshops

Monday, October 22nd, 2007



Venue Information:
**Millennium
Knickerbocker Hotel**

163 East Walton Place
Chicago, IL 60611
PHONE: 312.751.8100
FAX: 312.751.0370

www.millenniumhotels.com

Mention the conference name for a special discount rate of \$225/night for the standard single or double room.

Note: Special room discount rate expires by October 1st, 2007.

Contact hotel for directions and transportation suggestions.

A 8:00 am – 11:00 am Registration – 7:30 am (Breakfast included) **Improved Retention to Maximize KPIs: 10 Ways to Cut Agent Turnover**

How you will benefit:

- Take an action-oriented strategy with specific tactics back to your center for immediate implementation
- Initiate a permanent change in your center's culture by making retention a top-five priority to improve all KPIs
- Increase your own contributions and professional knowledge so you increase your value, now and in the future, by becoming a retention expert

What will be covered:

- Methods to establish and manage retention as a KPI for leaders on all levels
- Specific roles for executives, leaders, and agents so all contribute to retention
- A method for calculating the accurate cost of turnover in your center so you can leverage this figure for awareness and action

Your workshop leader: Dick Finnegan, Founder, Finnegan Mackenzie Resources, LLC

B 11:15 am – 2:15 pm Registration – 11:00 am (Lunch included) **Using Positive Coaching to Maximize Financial Service Quality**

How you will benefit:

- Learn two of the main concepts of The Positive Coach Approach: Call Center Coaching for High Performance and Retention
- Understand the LAMA® Technique for coaches, a conversational technique for guiding any conversation
- Hear about the High Five Method, a five step agenda to follow for a positive coaching session
- Obtain a tool that when used with agents will help create and maintain a productive working environment

What will be covered:

- Eight principles of positive coaching
- How to handle common coaching challenges
- An open discussion and Q&A on positive coaching techniques

Your workshop leader: Sally Cordova, Coach Trainer and Author of "The Positive Coach Approach" McKeek Consulting LLC

C 2:30 pm – 5:30 pm Registration – 2:15 pm **Integrating Compliance and Security Management Procedures into Your Financial Call Center Process to Avoid Litigations**

How you will benefit:

- Learn to identify situations in which liability arises
- Learn how to avoid liability and mitigate it when it has occurred
- Understand how to improve the customer experience

- advisory centers at financial service firms
- Last year's \$5 million fine against Merrill Lynch for call center supervisory failures, sales contest violations
- Recent developments and practices post-Merrill NASD action

What will be covered:

- Difference between call centers and customer

Your workshop leader: Jenice L. Malecki, Esq., Malecki Law

D 5:45 pm - 8:45 pm Registration – 5:30 pm (Dinner included) **Managing the Transition from Service Focus to Sales and Service Focus in a Financial Contact Center**

How you will benefit:

- Know how to create a customer-focused sales and service culture where everyone in the organization has the same sales and service attitude
- Walk away with practical tools to interact with customers and hand-off those relationships within the organization
- Understand how to effectively define a customer-centric culture

- ensure a successful cultural shift
- Introducing a communication process that equips everyone to identify and meet the customer's needs
- Discussing and evaluating the importance of trust and realizing "you can not export what you do not possess internally"
- Providing a workbook for "personalization"

What will be covered:

- Identifying a change management process to

Your workshop leader: Larry Roberts, President, The Roberts Business Group

Pricing	Register & Pay by 8/24/07	Register & Pay by 9/21/07	Register & Pay after 9/21/07
Workshops Only	\$549 each	\$549 each	\$549 each
Conference Only	(save \$500) \$1699	(save \$200) \$1999	\$2199
Conference + 1 Workshop	(save \$500) \$2249	(save \$200) \$2548	\$2748
Conference + 2 Workshops	(save \$600) \$2897	(save \$300) \$2997	\$3297
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