Bridging the gap

Customer Strategy & Planning 2014

Hilton Metropole
Brighton, 28-29 April

Gold Sponsor

nexidia ( )
Bridging the gap

Join us at Customer Strategy & Planning at the Hilton Metropole, Brighton on 28th and 29th April and take the opportunity to be part of our dynamic community of customer contact professionals.

This hugely popular conference pulls together well over 650 people from all industry sectors and offers a rich agenda including key topics such as strategy, customer experience and quality, performance, MI and analysis.

This year our theme is “Bridging the gap”. Sporting heroes give us a fantastic example of how to get the best from ourselves and our teams. They know clearly what their goals are, what their current performance level is and what they need to do to close the gap. They also know that improvements can always be made. The recent focus on marginal gains shows that even the smallest change can drive significant improvement. We all need to do this in our industry as well, as we know that lasting success depends on getting people engaged, creating an environment which allows this and releases their passion.

A dedicated Keynote Theatre with visionary presentations and discussions to interest the whole community is introduced this year. The two days which can be booked separately are “Customer & Colleague Engagement and Performance” and “Quality and Customer Experience”.

Regulars describe this as one of the leading events in the industry’s calendar. With Award finalist’s case studies from our Customer Contact Innovation Awards programme, specialist workshops on a wide range of topics and with round table discussions at nearly every session, this is a great way to enable you to identify practical insight to take back and apply in your organisation. We include networking opportunities throughout the day to meet colleagues from other organisations who face similar challenges and dedicated EXPO demonstrating the latest technologies.

Use this chance to help you understand the key ingredients for successful innovation, to learn from what has driven improvement in other organisations and to identify the next steps that can deliver both personal and operational success.

I look forward to seeing you this year.

Steve Woosey, Chief Executive

What delegates said in previous years:

“In sheer usefulness it was the best conference of any I’ve attended... superbly planned and organised...”

Sophie Patrikios,
Senior Director, Consumer Services, Lego

“This is the event to meet and debate with talent... you realise the gap between yourself and excellence.”

Karl Fletcher,
Business Relationship Manager, Freeman Grattan Holdings

Have you booked?

With over 650 attendees and superb feedback, delegates value our focus on practical experience and the chance to meet with others facing similar challenges.

• Full Conference Place £1295 (£1095*)
• 1-day Conference Place £650 (£550*)
• 1-day Keynote Theatre £350 (£195*)

*Member price

All prices exclude VAT. Conditions apply. Member packages include free conference places and discount for colleagues.

Special offers are available to Public Service and Not for Profit organisations.
Networking

Conference Expo and Networking
This is a great opportunity to talk with the people you want to meet – something delegates tell us they value at our event. More than a conference, you can also:

- Meet colleagues from other organisations and industry experts in one easy location
- Catch up with the latest development and upgrades from the industry’s leading suppliers
- Book time in advance for 1-1s or meetings
- Stay for post event drinks, or join Phil for a refreshing run along the Brighton seafront. Surprise post dinner networking event on Monday will be announced

Key features of the conference this year include:-

**Keynote Theatre** – with inspiring speakers these will be held on two very broad strategic topics: Customer & Colleague Engagement and Performance, Quality and Customer Experience. Hosted jointly with ourselves and many industry associations and communities, this is a great sign of the industry coming together to promote good practice.

**Clinics** – Discuss your challenges with experts on a wide range of topics. This is a great opportunity to focus on your biggest challenge and get personal advice from experienced practitioners.

**Round-table discussions** – Many sessions are seated in round-tables, some of which are pre-allocated, so that you meet with people facing similar issues or in similar roles. Remember to state your preferences in the booking system!

What delegates said in previous years:

“The PPF conference was different… attendees wanted to share their experiences, ideas, challenges, innovations ‘for the good of the industry’. Refreshing.”

Michael Sherwood,
Customer Experience, Tesco Bank

“A great couple of days followed by a really wonderful evening… best industry event I’ve attended.”

Ivan Smith,
Support Services Manager, Motability Operations

“A really useful couple of days, great networking together with some real gems of learning to take back – actual, practical ideas that will make a difference.”

Simon Hill,
Head of Operations Control, Camelot
Conference and Awards Gala Dinner

The Gala Dinner for the Customer Contact Innovation Awards 2014 will be held on the final night of the conference, Tuesday 29th April 2014 at Brighton Hilton Metropole. The awards will be announced and presented during this fabulous black-tie event, which will include entertainment, live music and dancing into the early hours.

This is a chance to meet industry professionals from other leading customer contact centres and seriously motivate your teams or clients with a real celebration.

Each of the 2014 Innovation Award finalists will have an inspiring story for us to learn from and we will salute their achievement, celebrate their success and present the award winners with their trophies. We will also announce our new Planning Heroes and celebrate with graduates from our Advanced Certificate in Contact Centre Management.

The price of a full conference place includes the gala awards dinner. Extra places are available at £150+ VAT for colleagues who wish to attend the dinner, but not the conference, bookings of 10+ dinner places will be discounted by 10%. Seating will be at both round and trestle tables.

Book now

Places are limited due to the size restrictions of the venue, so book now to be sure of your space.

Sample Dinner Menu

******
Leek & potato soup, chive crème fraîche
******
Slow cooked beef steak, horseradish mash, Yorkshire pudding, honey roast root vegetables, pan jus

Vegetarian option
Butternut squash risotto
******
Dark chocolate fondant, milk ice cream, mint powder (V)
******
Coffee & confectionery
******
Each table will also be supplied with fresh water and four bottles of wine
Keynote Theatre Day - Monday 28th April

The Customer & Colleague Engagement Forum

A fantastic chance to keep up to date with inspiring speakers and practice case studies, this day is a special event within the wider conference. You get to benefit from exceptional networking and see highly-rated influential speakers on the vital strategic issues of customer and colleague engagement. The Engagement Forum today is being hosted jointly by the Professional Planning Forum, Engage Customer, CCMA, Customer Service Training Network and the London & South East Contact Centre Forums. The special member rate of just £195+VAT pp applies to members of all these communities. This is valid for these Keynote Theatre sessions and the networking and catering areas. Registration from 8am.

08:00 Registration

09:00 Opening Keynote

Bridging the gap: people build success – The opening keynote presentations are hosted by Steve Woosney, CEO at the Professional Planning Forum. Our keynote speakers learn from models that drive success in areas like sports and performance, in order to help us focus on the gap we need to bridge in our own operations and the critical factors in making this a practical reality.

10:20 Refreshments and networking in the exhibition area

11:00 Keynote Theatre

Customer & Colleague Engagement – Uncover the critical dimensions to engaging today’s customers. This is the chance to absorb thought-provoking insight from first-rate keynote speakers such as: Alex Walker, Customer Service Director, Miele UK, and Richard Sedley, Board member at Seren and formerly Course Director for Social Media at the CIM. Round-tables offer the chance to network with colleagues in similar roles in other organisations and to engage with the ideas raised by our speaker.

Lunchtime Keynotes

Take an early or late lunch – in order to catch the keynote speaker of your choice. These briefing sessions cover critical topics for the industry, concisely providing a real depth of insight.

12:40: Planning for Digital channels and social media
13:20: Deliver excellence and drive customer loyalty: Lyn Etherington, author, consultant and MD at Cape Consulting shares research results and practical insights about how the behaviour of those in direct customer contact can be developed to deliver excellence and drive customer loyalty.

14:00 Keynote Theatre

Customer & Colleague Engagement – Focus on the new red-hot topic of engaging our people, with understanding on the latest thinking stimulated from top presenters – Peter Slade, Head of Consulting in Europe for Gallup and Professor Kerstin Alves from the Dept of HR studies at Tilburg Univerity, a contributor to the MacLeod report. Richard Brimble, Director of Organisational Development and IT at Affinity Water and 2013 Lifetime Achievement Award winner rounds off the session.

15:45 Refreshments and networking in the exhibition area

16:15 Closing Keynote

Growing professionalism in the industry – Steve Woosney hosts our end-of-day keynote, by introducing experienced speakers to help us focus on the three pillars of professionalism: Learning and qualifications, Continuing professional development (and accreditation), Raising standards. Hear from senior leaders: Why do I invest? How do we understand the value we can create? How do we take a support function from good to great? This includes the chance to ask questions and contribute from the floor.

Team Away Day

This is an exceptional chance to bring members of your leadership and management communities to experience the ethos of our hugely popular conference. Contact us direct if you would like details of our Team Awayday offer for members - this is a chance to bring a whole team for a best practice day together.
The Performance, Quality & Customer Experience Forum

A fantastic chance to keep up to date with new ideas and practical experience, this day is a special event within the wider conference, hosted jointly with the Top 50 programme, the P&Q campaign and the London & South East Contact Centre Forums. You get to benefit from exceptional networking and gain new insight from those who are pushing the boundaries of best practice in performance, quality and customer experience. The special member rate of just £195+VAT pp applies to members of all these communities. This is valid for these Keynote Theatre sessions and the networking and catering areas. Registration from 8am.

08:00 Registration

09:00 Opening Keynote

Bridging the gap: people build success – Join other delegates for this morning’s opening presentations of Customer Strategy & Planning 2014. Hosted by Paul Smedley, the PPF’s Founder & Chair, this is a chance to focus on the key challenges for 2014. Keynote speakers include Jo Causon, CEO at the Institute of Customer Service, who will be sharing practical insights from their latest UK Customer Service Index and helping us understand the role of customer service in creating a growing and sustainable economy.

10:20 Refreshments and networking in the exhibition area

11:00 Keynote Theatre

Performance, Quality & Customer Experience – Today’s joint session with the Top 50 and P&Q communities kicks off with two impactful case studies from the Innovation Awards. Hear how WorldPay has transformed the QA scorecard, doubled the audits, provided tailored meaningful coaching to advisors and created a step change in performance. Learn how Experian provides a single, flexible, comprehensive framework for assessing process and competency that is encouraging outstanding achievement.

- See how Experian raised customer advocacy 8 points, while cutting QA resourcing by 70%
- Discover how engagement and incentives were ‘key’ to delivering sustained change at WorldPay

Lunchtime Keynotes

Take an early or late lunch – in order to catch the keynote speaker of your choice. These briefing sessions cover critical topics for the industry, concisely providing a real depth of insight.

- 12:40: Carolyn Blunt – shares how to reduce AHT without setting targets
- 13:00: Employee Engagement – a chance to join members of the London & South East Contact Centre Forums hear this inspiring keynote (speaker details being confirmed)
- 13:20: Nick Herbert, Ad Exchange – Understand the power of the right words

14:00 Keynote Theatre

Ten Top Tips – for improving Performance, Quality & Customer Experience. Hear from 4 winners of the March P&Q challenge, experienced leaders in the Top 50 Companies for Customer Service and members of the PPF advisory board for our Quality & Customer Experience Forum. Short presentations by ten experienced practitioners or experts are followed by discussion and the chance to put your own questions, add suggestions and vote on your favourites. This lively afternoon session is not quite reality TV, but puts a very different face on the real ‘call centre’!

- Takeaway practical tips on improving quality
- Gain insight from those leading the way

15:45 Refreshments and networking in the exhibition area

16:15 Closing Keynote

Rising to the customer challenge in 2014 – Paul Smedley & Steve Woosey host our end-of-conference keynote, with two headline speakers who send us away inspired and focussed to rise to the customer challenge in bridging the gap and enabling our people to build success.

Team Away Day

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Key Topic pathways – Monday

Organised as part of Customer Strategy & Planning 2014, these key topic pathways offer a route through the conference that is specifically tailored to the needs of specialist interest groups. Take advantage of this opportunity to invite colleagues from other parts of your organisation to join other professionals and influential industry leaders in these key topic areas.

<table>
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<tr>
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<td><strong>14:00 Speech Analytics</strong>&lt;br&gt;Award finalists City Park Technologies and Neopost demonstrate powerful results quickly.</td>
<td><strong>14:00 Outbound Contact</strong>&lt;br&gt;Round Table Clinics on a choice of topics. Learn from experienced practitioners and experts.</td>
<td><strong>14:00 Field Operations</strong>&lt;br&gt;Meet others planning in this area to deepen your understanding of what best practice looks like.</td>
<td><strong>14:00 Volatility &amp; Flexibility</strong>&lt;br&gt;Workshop on measuring what you require and how to monitor the progress you make.</td>
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For more information www.conference.planningforum.co.uk Tel +44(0)333 123 59 60 Email info@planningforum.co.uk
Key Topic pathways 2014 – Tuesday

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<td>11:00 Flexibility, Learning &amp; Homeworking</td>
<td>11:00 IVR, routing &amp; resourcing</td>
<td>11:00 Resource Planning</td>
<td>11:00 Structuring Planning</td>
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<td>Inspiration from 2 Award finalists: Worldpay and Experian. See how transforming QA drove results.</td>
<td>Award finalists Three &amp; TalkTalk reveal how planning can be fundamental to transforming the customer journey.</td>
<td>Award finalists IFDS and InterCall show the impact of planning in the back office and for conference call services.</td>
<td>Workshop on how business goals should shape your planning – whether for front or back office, retail, field or outbound.</td>
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<td>14:00 IVR/Routing</td>
<td>14:00 Back Office</td>
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<td>Workshop focussed on overcoming the barriers to homeworking and lifestyle/trade-off shifts.</td>
<td>Workshop to understand the impact of small choices on customer journey &amp; call routing – taking key steps towards an effective review.</td>
<td>Round Table Clinics for processing and Back Office operations. Learn from experienced practitioners and experts.</td>
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Thank you to our sponsors...

**Gold Sponsor**

Nexidia (www.nexidia.com) long term educators of customer interaction analytics, works with some of the world's largest contact centres to develop and deliver comprehensive video and audio search platforms. Innovation is at the centre of the systems that Nexidia develops and our impetus is to drive forward the value of the contact centre as a strategic asset. The ability to capture multi-channel interactions, analyse the data and then use this valuable insight to improve the performance of nearly every area of the organisation, is the heart of Nexidia. Interaction analytics, an intrinsic part of our DNA, puts executives and customer service leaders in touch with the frontline.

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Engagement Keynotes  
Absorb thought provoking speakers: Alex Walker, CS Director at Miele and Richard Sedley, Seren.  
Case Studies  
Enterprise Planning Inspiration from 2 Award finalists: LV= and UPC. See how planning gets to the heart of the business.  
Case Studies  
Analysis & Planning  
WebHelp UK and Echo Managed Services talk about omni-channel campaign & the Discovery Lab.  
Workshop  
Planning for Digital  
Workshop for anyone just beginning to plan for social media or web chat and wanting to learn.  
Clinics  
Speech Analytics  
Round Table Clinics on a choice of topics. Learn from experienced practitioners and experts.  
Research  
University Projects  
Join in discussion about research projects from BSc students – limited capacity.  
Presentations  
Next-generation learning  
Join Customer Service Training Network for 3 inspiring speakers on new approaches.  

12:30 | During lunch choose one of six activities (unless you are in a master class).  
12:40 Keynote  
Cross-Channel contact management  
13:20 Keynote  
Lyn Etherington builds on established research to explore the links between employee & customer engagement.  
13:10 Keynote  
Technology Update on Social Customer Service  
Speaker details to be confirmed later.  
12:40 Keynote  
Internal Intelligence  
Technology Update on Social Customer Service  
Speaker details to be confirmed later.  
Networking  
Lunch is served at networking tables for a more extended conversation.  
Free Time  
Take lunch and organise your own meetings or activities between 12:30 – 14:00.  
Reporting Master Class  
See your reports with your customer’s eyes. In this extended workshop (from 13:30-17:30), we invite you to bring samples of your own reports to review with colleagues and experienced analysts.  
14:00 | Take time now to visit suppliers in the EXPO area or arrange 1:1 meetings.  
Engagement Keynotes  
Engaging our people: be stimulated by three senior leaders from Gallup, M&S and Affinity Water.  
Speech Analytics  
Award finalists City Park Technologies and Neopost demonstrate powerful results quickly.  
Easy for Customers?  
Learn from Award finalists Santander about the impact of vScreen technology.  
Volutility & Flexibility  
Workshop on measuring what you require and how to monitor the progress you make.  
Social Customer Service & Outbound Clinics  
Round Table Clinics on a choice of topics. Learn from experienced practitioners and experts.  
Field Operations  
Meet others planning in this area to deepen your understanding of what best practice looks like. |
| 15:30 | Refreshments and networking – visit the conference EXPO and meet key industry suppliers |
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| 17:30 | Networking event: Join us for drinks to meet industry leaders, colleagues and members. Or join a social run which will take in the local sites.  
Post dinner: Join us for our networking activity – more details to follow |

For more information www.conference.planningforum.co.uk  
Tel +44(0)333 123 59 60  
Email info@planningforum.co.uk
Monday 28th April

11:00 – 12:30 Choose from these rewarding and diverse morning sessions.

Keynote Theatre
Customer & Colleague Engagement – Uncover the critical dimensions to engaging today’s customers. This is the chance to absorb thought-provoking insight from first-rate speakers such as: Alex Walker, Customer Service Director, Miele UK, and Richard Sedley, Board member at Seren and formerly Course Director for Social Media at the CIM. Round-tables offer the chance to network with colleagues in similar roles in other organisations and to engage with the ideas raised by our speaker.
- Understand the critical dimensions of customer engagement
- Gain insight from industry thought leaders

Case study presentations
Enterprise planning – Inspiration from 2 Innovation Awards finalists. Learn how LV= closed long-range, mid-term and service delivery gaps, saved £1.1million and extended their integrated planning approach to Claims, achieving a sector-beating 85% customer satisfaction. See how the UPC planning team planned the customer journey enterprise-wide for the new Horizon TV HD+ service, including IVR and field operations, delivering 80%-90% self-serve.
- See how planning gets to the heart of business
- Hear about customer journey planning
- Discover how planning can cross internal siloes to look at IVR, field and claims operations

Case study presentations
Insight, analysis & planning – 2 Award finalists share high-impact stories. Webhelp UK has scientifically brought data and people together to drive continuous improvement and pioneer a Discovery ‘lab’, which has already improved client NPS 30% and reduced calls 53%. At Echo Managed Services a comprehensive omni-channel contact strategy, including a proactive outbound campaign, has helped deliver RAF recruiters a 400% increase in career registrants.
- See how omni-channel contact raises response
- Hear about analysis & campaign planning
- Learn how a Discovery Lab challenges thinking and pinpoints improvement opportunities

Workshop & Discussion
Planning for Digital – If you are considering or have just begun planning for social media, web chat or are looking to move contact from traditional channels this session will help you take this forward in your organisation. Led by Dave Vernon, this workshop is a chance to hear from other organisations who have embedded social media and web chat functions into their planning processes about the challenges and successes this brings.
- Hear from experience in other organisations
- Discuss with experts how to plan effectively
- Take away practical ideas for your operation

Round Tables & Clinics
Speech analytics – Discuss your challenges with experts in 1 or 2 of these topics: Picking your first application, making the business case, choosing a supplier, recruiting the right analysts or internal governance. Hosts will be experienced practitioners from our PPF community of best practice and technical experts.
- Gain insight from experts & practitioners
- Take time to focus on your biggest challenge

University Projects
BSc Student projects – Join in discussion about research projects from Gerry Chambers, Student Loans Company and Claudine Moss, Centrica. Topics include “Value of new Technology to customer” and “Understanding Development Journeys for Planners”. Limited capacity so book early.
- Understand what the final BSc year involves
- Gain insight from participating in the discussion and help shape the research agenda

Presentations & Discussion
Next generation learning – Chaired by Don Hales of the Customer Service Training network, this is a chance for trainers and others interested in learning and development to hear from two inspiring and highly rated speakers – Mike Havard (Director at Silver Lining) and Geoff Langston (MD at Arizon). Focus on the needs of different learning styles and the development needs. Understand the potential as well as the pitfalls for elearning and mentoring – in helping people own their own development.
- Gain insight from new research
- Understand the needs of different learners
- Explore the potential of new approaches
Monday 28th April

12:30 – 14:00 Choose from these rewarding and diverse lunchtime sessions.

12:40 Briefing & Case Study
Cross-Channel contact management – Building on the 7 habits of organisations that currently deliver a more integrated omni-channel experience, Matt Hey from CACI helps us understand the data we need to look for and how to obtain it. This keynote also gives the chance to learn from practical experience at Vodafone UK who have implemented a cross-channel lead management. Followed by lunch at 13:10.
- Understand what data enables more integrated experience and what helps us collect it
- Learn from a practical case study and compare this with your experience to plan your next steps

13:10 Qualifications Update
The Development Roadmap Hear the latest news on the development roadmap for our BSc qualifications with the University of Ulster. With many students already undertaking the programme, this session looks at what they have learned and how the modular programme is being extended to support professionalism in many different types of role within the customer contact operation. Take lunch at 12:30 before this keynote.
- Hear news on how the programmes are being received by students
- See how the framework is being developed to offer new development pathways for operational leaders and managers as well as support teams

13:20 Deliver excellence & drive customer loyalty
Lyn Etherington, author, consultant and MD at Cape Consulting shares research results and practical insights about how the behaviour of those in direct customer contact can be developed to deliver excellence and drive customer loyalty. Building upon research into the 8 ‘Loyalty Building Experiences’ and referencing other research about behavioural impact, Lyn will give practical insight into how people can make a real difference to business performance.
- Understand the behaviours that can drive customer loyalty
- Uncover the 5 Characteristics of Success in delivering excellence through people

13:10 Technology Update
Systems demonstrations and briefing We hope to have news of these in February, following the success of this at the National Best Practice Seminar in November. Contact us if you would like to offer an update.

12:40 Networking Lunch
Networking Tables Lunch is served at tables for a more extended conversation. You can meet others on the day or contact us in advance if you wish to be seated with a particular networking group or with others from the same company. Either way, a great chance to take the conversations further.

12:30 – 14:00 Free time
Lunch time Some people like to keep lunch free for their own meetings and activities – or take a quick lunch and spend time in the exhibition area.

12:30 – 14:00
Take an early or late lunch – in order to catch the keynote speaker of your choice. These briefing sessions cover critical topics for the industry, concisely providing a real depth of insight. Lunch is served between 12:30 and 14:00 and the different choices will help you avoid unnecessary queues and make the best of the conference opportunities.
Monday 28th April

14:00 – 15:30 Choose from these six informative and powerful sessions.

**Keynote Theatre**

**Customer & Colleague Engagement** – Focus on the new red-hot topic of engaging our people, with understanding on the latest thinking stimulated from top presenters – Peter Slade, Head of Consulting in Europe for Gallup and Tanrith Dodge, HR Director at M&S and a board member of Engage for Success – the UK Government task force. Richard Brimble, Director of Organisational Development and IT at Affinity Water and 2013 Lifetime Achievement Award winner rounds off the session.

- Hear how people truly build success
- Understand the critical elements of people engagement
- Gain insight from industry thought leaders

**Case study presentations**

**Speech Analytics** – 2 Awards finalists demonstrate powerful results by analysing customer conversations. **City Park Technologies** has helped raise the bar on compliance, training and call handling, moving from target base KPI’s to best practice mentality of improvement. **Neopost** increased the speed and reliability of decision making and helped deliver improvements for colleagues and customers, cutting calls by 24% on one call type and hold-time 27% on another.

- Understand how using analytics is changing customer conversations and driving performance improvement
- Hear about how to get measurable results
- See how to deliver sustained change

**Presentation & Discussion**

**Can technology make life easier for customers?** – Innovation Award finalist, Santander, reveal how they use vScreen secure, compliant, web-based sessions to guide customers through applying for a credit card in real time. This replicates the face-to-face sales process and is much quicker & more personal. Customers now receive cards 12 days earlier and reaction is 95% positive. Experts & practitioners lead discussion on the wider opportunities for all of us.

- Learn how secure, compliant web-based sessions can mimic face-to-face communication
- Review potential customer journey changes
- Identify opportunities for new technology

**Workshop & Discussion**

**Volatility and flexibility** – Explore techniques for measuring the variability of your workload, understand what flexibility you require and explore how you can monitor progress in becoming more flexible – for both people and customers. Led by Phil Anderson, this workshop includes round table discussions, updates from our member working groups. It will help you understand how the Flexibility Toolkit could work for you.

- Learn ways to measure volatility & flexibility
- See how volatility at different time horizons helps you determine the flexibility tools you require
- Gain insight into the ways that managing volatility is fundamental to successful planning

**Round Tables & Clinics**

**Social Customer Service and Outbound Clinics** – Discuss your challenges and issues in the emerging area of Social Customer Service. Hear how others are addressing this challenge. Outbound topics under discussion will include; Effective collections operations, Maximising sales revenue, Campaign planning, Multi-channel strategies, or Compliance. Hosts will include experienced practitioners from our PPF community of best practice.

- Gain insight from experienced practitioners
- Take time to focus on your biggest challenge

**Field Networking Group**

**Field Service Operations** – Meet others planning in this area to deepen your understanding of what best practice looks like. Learn from key stakeholders at **UPC** following this morning’s case study and hear about latest developments from other members of the group.

- Discuss with practitioners, suppliers and specialist experts
- Take away practical ideas for your operations

**13:30 – 17:30 Reporting Master Class**

**See your reports with your customers’ eyes** – In this extended workshop, led by Colin Whelan, the PPF lead on data, analysis & insight, we invite you to bring samples of your own reports to review with colleagues from similar roles in other organisations. Experienced analysts will offer feedback and advice and support table group discussion on questions like: What is the key message? For who? What else does it say? Does it tell you a story? What alternative formats could you consider?

- Road test – in a safe group of fellow professionals – reports you are working on and looking to improve
- Identify key pitfalls to avoid and take away practical steps for improving your reports
### Conference Agenda Tuesday 29th April

**08:00**  
Registration and refreshments – visit the conference EXPO and meet key industry suppliers

**09:00**  
**Bridging the gap: people build success:** Join other delegates for this morning’s opening presentations of Customer Strategy & Planning 2014. Hosted by Paul Smedley, the PPF’s Founder & Chair, this is a chance to focus on the key challenges for 2014. Keynote speakers include Jo Causon, CEO at the Institute of Customer Service, who will be sharing practical insights from their latest UK Customer Service Index and helping us understand the role of customer service in creating a growing and sustainable economy.  

**10:15**  
Refreshments and networking – visit the conference EXPO and meet key industry suppliers

**11:00**  
**11:00 Take time now to visit suppliers in the EXPO area or arrange 1:1 meetings.**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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| **Keynote Theatre**  
**Quality & Customer Experience**  
Inspiration from 2 Award finalists: Worldpay and Experian. See how transforming QA drove results.  
**Case Studies**  
IVR, routing & resourcing  
Award finalists Three & TalkTalk reveal how planning can be fundamental to transforming the customer journey.  
**Case Studies**  
Resource Planning  
Award finalists IFDS and InterCall show the impact of planning in the back office and for conference call services.  
**Workshop**  
Flexibility, Learning & Homeworking  
Finalists Arise and Aviva Healthcare demonstrate on-demand homeworking and planning for learning/development.  
**Clinics**  
Executive Clinics  
Unique chance to meet with key leaders & senior managers within our communities of best practice.  
**Research**  
University Projects  
Join in discussion about research projects from BSC students – limited capacity.  
**Workshops**  
Structuring Planning  
Workshop on how business goals should shape your planning – whether for front or back office, retail, field or outbound. |
| **12:30**  
**12:40 Keynote**  
Carolyn Blunt of Real Results looks at ten critical factors for reducing AHT without setting targets. Followed by lunch at 13:10.  
**13:20 Keynote**  
Nick Herbert, from Ad Exchange, helps us understand the power of the right words. Take an early lunch first at 12:30.  
**13:10 Keynote**  
PPF Specialists share new benchmark data from the specialist Skills Framework and offer ideas on how this can help you.  
**12:40 Keynote**  
Colleague Engagement  
Join members of the London and South East Contact Centre Forums for inspiration on this hot topic.  
**Networking**  
Lunch is served at networking tables for a more extended conversation.  
**Free Time**  
Take lunch and organise your own meetings or activities between 12:30 – 14:00.  
**Activation Forum**  
13:15 – 17:15  
If your head is buzzing with ideas from the two days, book this session to develop your own post-conference agenda. Building on the huge success of last year’s ‘unconference’, you can experience a similar format again or try it for the first time. Led by Peter Massey, MD at Budd, you gain benefit from many different conversations and can take the discussion where you need to go. |

**14:00**  
**14:00 Take time now to visit suppliers in the EXPO area or arrange 1:1 meetings.**

<table>
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| **Performance & Quality**  
Ten top tips from P&Q, Top 50 and PPF award winners – with discussion and the chance to put your own questions.  
**Engagement & Improvement**  
Innovation Award Finalists Capital One UK and Home Retail Group share insight on engaging colleagues in driving change.  
**IVR/Routing**  
Workshop to understand the impact of small choices on customer journey & call routing – taking key steps towards an effective review.  
**Homeworking & Lifestyle Shifts**  
Workshop focussed on overcoming the barriers to homeworking and lifestyle trade-off shifts.  
**Back Office**  
Round Table Clinics for processing and Back Office operations. Learn from experienced practitioners and experts.  
**University Projects**  
Learn about new academic research which gives insight to current issues in contact centres. |

**15:45**  
Refreshments and networking – visit the conference EXPO and meet key industry suppliers

**16:15**  
**Rising to the customer challenge in 2014:** Paul Smedley & Steve Woosey host our end-of-conference keynote, with two headline speakers who send us away inspired and focussed to rise to the customer challenge in bridging the gap and enabling our people to build success.

**17:15**  
Conference Close

**19:00**  
Finalist Reception

**19:30**  
Gala Dinner
Tuesday 29th April

11:00 – 12:30 Choose from these rewarding and diverse morning sessions.

Keynote Theatre
Performance, Quality & Customer Experience – Today’s joint session with the Top 50 and P&Q communities kicks off with two impactful case studies from the Innovation Awards. Hear how WorldPay has transformed the QA scorecard, doubled the audits, provided tailored meaningful coaching to advisors and created a step change in performance. Learn how Experian provides a single, flexible, comprehensive framework for assessing process and competency that is encouraging outstanding achievement.
- See how Experian raised customer advocacy 8 points, while cutting QA resourcing by 70%
- Discover how engagement and incentives were ‘key’ to delivering sustained change at WorldPay

Case study presentations
IVR, routing & resourcing – 2 Awards Finalists share high-impact work. The planning team at Three have steered work, in UK & India, to plan for market growth at no incremental cost, by transforming both IVR navigation/self-service and scheduling/skilling. Stakeholder engagement has been vital in helping TalkTalk move its IVR from touch-tone to natural language, with results including 94% accuracy and 16% reduction in agent transfers.
- See how planning can be at the heart of change
- Learn about new opportunities for routing & self service, using IVR/natural language
- Hear how to resource effectively in UK & India

Case Study presentations
Resource planning – 2 Awards Finalists demonstrate powerful results. By balancing peaks and troughs in the back office registrations processing operation at IFDS, productivity was raised 18% and development training was scheduled at no additional cost. Applying planning principles and developing new reporting and planning tools at InterCall has transformed operational performance in a previously ‘unplannable’ business for this conference services provider.
- Understand the impact on culture and performance of establishing robust planning in new areas
- See planning at work in the back office
- Hear how to resource the ‘unplannable’

Case Study Presentations
Flexibility, learning & homeworking – Inspiration from 2 Innovation Awards finalists. See how Arise achieves scalable, on-demand resources for 45+ clients globally with a 54% increase in agent performance through their self-employed homeworkers. Learn how the planning team at Aviva Healthcare has been instrumental in people development using high-level buy-in to drive a programme of bite-sized learning that has improved NPS and supported a £3m profit.
- Understand the tools & virtual operating model that has made on-demand homeworking
- Gain insight on how to integrate continuous learning into end-to-end planning processes

Round Tables & Clinics
Executive Clinics – Take this unique chance to meet for 30 mins with key leaders and senior managers without our communities of best practice. Book early for 1 or more slots, depending on capacity – names available in mid-February. Open to all, with priority for professionally accredited members & students if space is limited.
- Discuss strategic issues with senior leaders
- Fresh perspectives on your own challenges

University Projects
BSc Student projects – Join in discussion about research projects from Dave Vernon, Planning Forum, Aaron Gourlay of Eurostar, and David Maguire, npower. Topics include “Value of customer interaction” and “Analysis of Qualitative and Quantitative Reporting” and “Customer Retention Strategies”. Limited capacity so book early.
- Understand what the final BSc year involves
- Gain insight from participating in the discussion and help shape the research agenda

Workshop & Discussion
How to structure your planning – See a variety of approaches used by our members, from long term planning to post-day learning, whether in a central support team or out in the operation. Led by Steve Woosey, we will focus on how your desired business goals should influence the structure of your planning, highlight how to overcome barriers and identify critical steps that must be included in all plans, whether for the front office, back office, outbound, field or retail.
- Takeaway practical steps to improve how you structure your planning function & workload
- Uncover pitfalls to avoid in each approach
- Discuss which structure works best for you
Tuesday 29th April

12:30 – 14:00 Choose from these rewarding and diverse lunchtime sessions.

12:40 Keynote Presentation
10 ways to reduce Average Handling Time. Carolyn Blunt, Managing Director of Real Results Training, looks at the critical factors that reduce AHT, through agent training, technology and processes. In an engaging presentation, Carolyn explores how you can achieve an effective and practical balance between efficiency and quality customer experience; whilst avoiding the adverse consequences often associated with targetting advisors on AHT. Followed by lunch at 13:10.
- Understand which factors actually reduce handling time and how to manage them
- Benchmark your organisation against best practice for faster and seamless call handling

13:10 Keynote Presentation
Skills benchmarking Specialists from the PPF share new benchmark data from the Planning Forum Skills Framework for specialist support team functions and offer ideas on how this can help you.
- See how the skills framework supports development and what the data says about current skills
- Gain ideas to develop your support teams

12:40 Keynote Presentation
Little words make a big difference Nick Herbert, CEO at Adexchange, builds on the hugely impactful work he has already shared with our members on IVR. This time he pinpoints the ways in which careful attention to words with both internal and external customers can help us achieve our goals much more clearly. Fewer words can achieve far greater clarity, cut the time we spend on a call and avoid future queries.
- Understand the ways in which words and phrasing can impact the customer journey
- Think how careful choice of words can help you with your own internal customers

13:10 Technology Update
Systems demonstrations and briefing We hope to have news of these in February, following the success of this at the National Best Practice Seminar in November. Contact us if you would like to offer an update.

12:40 Networking Lunch
Networking Tables Lunch is served at tables for a more extended conversation. You can meet others on the day or contact us in advance if you wish to be seated with a particular networking group or with others from the same company. Either way, a great chance to take the conversations further.

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Tuesday 29th April

14:00 – 15:30 Choose from these six informative and powerful sessions.

Keynote Theatre

Ten Top Tips – for improving Performance, Quality & Customer Experience. Hear from 4 winners of the March P&Q challenge, experienced leaders in the Top 50 Companies for Customer Service and members of the PPF advisory board for our Quality & Customer Experience Forum. Short presentations by ten experienced practitioners or experts are followed by discussion and the chance to put your own questions, add suggestions and vote on your favourites. This lively afternoon session is not quite reality TV, but puts a very different face on the real ‘call centre’!

- Takeaway practical tips on improving quality
- Gain insight from those leading the way

Case study presentations

Engagement & improvement – Inspiration from 2 Innovation Awards finalists. Find out how Capital One UK got to the top of the employee satisfaction chart with initiatives like: job rotation, creating short films, providing support to over 400 charities and forming an employee choir. See how the continuous improvement methodology at Home Retail Group is focused on introducing small changes that together make a big difference. These are collated alongside issues raised through 10 other data sources – including analytics and customer feedback.

- Hear top tips for engaging colleagues
- Learn about continuous improvement methods
- Understand how to involve people in driving improvement, combining this with data insights

Workshop & Discussion

IVR/Routing – Understand the potential impact on customer journey and call routing offered by different small choices you can make within your IVR or natural language system. Dig more deeply into the role of structure and phrasing and the importance of having the right measures in place. Led by Phil Anderson, there will be round table discussions and the chance to focus on what to look for when undertaking a review.

- Gain insight into the impact on customers and colleagues of those first seconds of every call using IVR
- Learn ways to measure your success in designing this first part of the customer journey
- Take key steps towards an effective IVR review

Workshop & Discussion

Homeworking & Lifestyle Shifts – Join us for this interactive workshop led by Dave Vernon & Steve Woosey. Focus on overcoming the barriers to implementing homeworking and examine how lifestyle/trade-off shifts can deliver for both colleagues and the business. Hear from our table facilitators on how to influence the key stakeholders and deliver a flexible workforce through the use of homeworkers and lifestyle shifts. Take away some techniques that can help you make this a reality in your business.

- See how to achieve buy in from stakeholders
- Understand how lifestyle shifts can be achieved for the benefit of all
- Learn how to overcome barriers to homeworking

Round Tables & Clinics

Processing & back office operations – Discuss your challenges with experts in 1 or 2 of these topics: Effective planning, Skills strategy, Getting better data, Mapping processes, Performance management. Hosts will include Julian Harper, CEO of Red Owl, and experienced practitioners from our PPF community of best practice.

- Personal advice from experienced practitioners
- The chance to focus on your biggest challenge

University Projects

Research projects – Join this session to learn about new academic research which gives insight to current issues in Contact Centres. Two recent research projects will be discussed, showing how greater understanding of business practices can lead to greater employee engagement and customer satisfaction.

- Gain insight on customer contact interaction
- Help shape future research agendas

13:00 – 17:00 Activation Forum with Budd

Set your personal agenda – If your head is buzzing with ideas from the two days, book this session to develop your own post-conference agenda. Building on the huge success of last year’s ‘unconference’, you can experience a similar format again or try it for the first time. Led by Peter Massey, MD at Budd, the agenda is ‘activation’ – how you get beneficial changes from the ideas of the last two days – but it flows where you take it. You will love the ‘visual minutes’.

- Enjoy quality time to work on your own agenda
- Gain benefit from many different conversations
- Take the discussion where you need to go
Customer Contact Innovation Awards

Hear from all the 2014 finalists and find out how they achieved their success.

Seventeen organizations from across the whole spectrum of customer contact operations forms this year's sought-after shortlist for the 2014 Customer Contact Innovation Awards. It is a fantastic list of excellent achievements, which cover many of the critical challenges we all face in making lives better for our customers and our people, in a time of fierce competition and economic pressure.

This year’s entries were of a brilliant quality, with a great breadth of topics, and especially strong in the key areas that our community is driving, such as Planning, Analytics, Quality and Customer Experience. Each finalist submission has something tangible that members of our community could use to make a real change in their organisation.

All the 2014 Innovation Award Finalists will be presenting at this conference and this is a great opportunity to meet and find out how they have achieved their success. They will also each be hosting best practice site visits in the summer – which is your chance to find out more about how they achieved such outstanding results. Each short listed nomination will also be written up and added to our case study series, which will be part of the Planning Forum’s 2014 Best Practice Guide, a copy of which is presented to each conference delegate.

Each year the awards offer something special, a chance to see first hand the amazing work completed by our colleagues across the industry. This year is no exception with a diverse range of initiatives from small to large multi-site centres showcasing the best of good practice in UK contact centres. Do take the opportunity to join us in celebrating and learning from best practice at Customer Strategy & Planning 2014.

The Customer Contact Innovation Awards 2014 are a show-case for organisations that are leading the way in making their contact centre operations great places to work and to contact. These prestigious awards celebrate the achievements of the industry’s innovators and offer a benchmark within the industry.

Learn from the finalists

See all the 2014 finalist presentations at this conference:

**Monday 28th April**
- **11:00**  
  - LV=  
  - UPC
- **14:00**  
  - Santander
  - Neopost
  - Echo Managed Services
  - Webhelp UK

**Tuesday 29th April**
- **11:00**  
  - Experian
  - WorldPay
  - Arise
  - TalkTalk
  - Three
  - IFDS
  - Aviva Healthcare
  - InterCall
- **14:00**  
  - Capital One
  - Home Retail Group

Look at the following pages to see what each finalist has accomplished and what you can learn from them to take back to your own operation.
Innovation Awards Finalists

Arise – Agents on demand: high performance homeworking
See how Arise achieves scalable, on-demand resources for 45+ clients globally with a 54% increase in agent performance. Arise are specialist outsourcers with c25,000 self-employed homeworking agents in 4 countries. Their virtual operating model means they can match skill sets and demographics providing on-demand resources for daily, weekly or seasonal peaks. This has increased agent utilisation to over 90% for a UK client. Clients only pay for productive time. Agents use smartphones to control their schedules, through the mobile capabilities of Arise’s own Starmatic™ WFM system, building their own schedules and using bids/swaps too. Arise’s Star program drives quality, self motivation and high performance. Arise supports agents with 100% online virtual learning, real time chat rooms, 24X7 help desk and virtual engagement tools.

Aviva Healthcare – Continual learning: planning makes it happen
See how planning has been instrumental in people development using high-level buy-in to drive a programme of continual learning that has improved NPS, and supported a £3m profit. The Operations Development & Resource Planning Team at Aviva Health worked together with key stakeholders to develop the capability, processes, controls and governance required for the Continuing Learning Programme (CLP). They improved the way they collaborate and helped develop a creative and innovative culture. The CLP is integrated into the end-to-end planning processes. Training can be broken down into bite-sized slots, so continuous learning can take place around business as usual and agents are still available for the customer. It combines technical, soft skills and clinical education fitted around agents’ current skills and future career aspirations. NPS is tracking 2 points above average, 20% uplift in Employee Engagement regarding training provision, improved claims management & decision making. Contributing to an overall £3 million increase in bottom line profit.

Capital One – My Experience: Let’s Make Lives Better
Learn about the ambitious objectives that increased employee engagement through a new employee vision ‘Let’s make lives better’. Find out how Capital One UK got to the top of the employee satisfaction chart through a range of initiatives like: job rotation during ‘Customer Week’, creating short films to embed their vision, providing support to over 400 charities, and forming an employee choir. Engagement scores have increased more than 50 percentage points and turnover reduced. Above all, innovation and creativity have been galvanised on a grand scale among front-line associates, with 356 innovations resulting from an explosion of ideas. See how this trust and engagement has driven improvements to productivity, net promoter and net profit.

City Park Technologies – Speech analytics helps raise the bar
Discover how speech analytics has helped raise the bar on compliance, training and call handling, moving from target base KPIs to best practice mentality of improvement. An increased regulatory focus on best practice over target-based performance was what led financial services outsourcer City Park Technologies (CPT) to deploy CallMiner speech analytics software. Within just one month, compliance had improved 9% – to 95% – with the tool analysing 100% of all inbound calls where previously CPT had manually assessed just 0.14%. Since roll-out, the technology’s reach has been extended. Now used within induction training, it has increased new starters’ speed to competence by two weeks. Lessons learnt through the inbound deployment have also been used to enhance outbound call flow structures, compliance and behaviours. This approach has not only improved client confidence in CPT’s monitoring and reporting capabilities, but – combined with open and instructive dialogue – has positively impacted employee satisfaction.

Echo Managed Services – Campaign planning for RAF recruitment events
Discover how proactive partnering, combined with a comprehensive omni-channel contact strategy, has helped Echo Managed Services deliver the RAF a 400% increase in career registrants. When the RAF embarked on ‘just in time’ recruitment in 2010, its outsource partner Echo Managed Services swiftly adapted to meet its needs. An omni-channel contact strategy was developed, to include giving people who had visited the RAF’s events more ways to register for an RAF career. This included a proactive outbound campaign, which has resulted in eight times more candidate conversations, plus a 30% conversion rate resulting in a 400% uplift in candidate registrations. Echo has consolidated this activity with several stakeholder engagement initiatives, including knowledge-sharing seminars for the RAF’s newest recruiters. It has also started using sophisticated analytical methods to enhance profiling and targeting of potential draftees, enabling the RAF to optimise its contact strategy and the resources required in engaging these people.
Innovation Awards Finalists

Experian – Delivering excellence through Quality
See how a comprehensive new quality assessment framework helped increase by 8% points the customers rating their experience 9 or 10 out of 10. Experian cut the quality frameworks from 20 to 2, by creating a single, flexible approach, aligned to customer strategy and supported by a full process mapping exercise and a comprehensive review of competencies. The innovative scoring mechanism now moves someone towards success, rather than away from failure. Supported by coaching, colleagues gained the confidence to step outside the process to focus on what is right for the customer while delivering all compliance requirements. The new approach cut QA disputes by 46% within three months, reduced QA resourcing by 70% and included company-wide reporting, used by everyone from senior leadership to front line colleagues. Because the framework is future proof, the scorecard is easily recalibrated to support continual improvement of the business.

Home Retail Group – Continuous Improvement
Learn how improvements to customer experience together with significant cost efficiencies are being delivered through engaging frontline teams in generating changes that make life better for customers. Home Retail Group, owners of leading retail brands Argos and Homebase, has a universal continuous improvement methodology, focussed on introducing small changes that together make a big difference to customer service and the contact centre environment. The methodology, which is applied across all three of the Group’s customer service centres, engages frontline advisors through an innovative mechanism that empowers them to contribute ideas for change. These are collated alongside issues raised through 10 other data sources – including analytics and customer feedback – to build a single definitive list of issues, which is analysed to prioritise opportunities according to cost-benefit. Taking this approach ensures a single solution is applied across all sites, eliminating duplicated efforts and inconsistency in approach.

IFDS – Planning makes the difference in the back office
Learn how, by balancing peaks and troughs, productivity was raised 17% enabling significant development training to be undertaken to enhance operational flexibility. The new approach, in the Registration processing department at IFDS, balanced work across the week, creating over 16,000 hours for cross-skill training in a 7 month period, which further increased operational flexibility. Associates value this opportunity to develop; the days feel more structured and varied and it gave teams a fresh burst of energy. The vital step was training and coaching team leaders and managers and establishing the right mechanisms, so they could use the data from the AOM system to proactively share resources between specialist functions and quantify the needs and opportunities for resourcing flexibility. This greatly enhanced the relationship between operational managers in the UK and their Indian outsource partner.

InterCall – Optimising operational performance through planning
See how applying planning principles and developing new reporting and planning tools has transformed operational performance in a previously ‘unplannable’ business area. InterCall, a subsidiary of West Corporation, is the largest conferencing and collaboration services provider in the world. By implementing robust forecasting and planning methodology, its operational teams have delivered increased service levels daily for the past eight months whilst also reducing complaints. The Workforce Optimisation Team now has increased visibility of the frenetic workload and is now able to allocate resources five days in advance. InterCall has developed a purpose-built proprietary scheduling tool which has increasingly eradicated the need for manual planning and provides a single, definitive source of performance data for both internal and external customers. In addition the project has utilised cross-skilling and flexible working practices across previously siloed business areas to better meet operational demands, augmenting the current expertise of the team with focussed personal development.

LV= – Planning: from five years to 15 minutes
Learn how LV=’s integrated planning approach works across workplace siloes to close long-range, mid-term and service delivery gaps and save the business £1.1million. Holistic planning has been the watchword of LV=’s planning team who, with a starting point of new integrated Avaya technology and a management restructure, have overhauled their previous budget and capacity models to create a clear line of sight of 15-minute intervals and how these impact the five-year plan. Performance Analysts, business improvement and operations now consult to resolve variation against agreed metrics and adjust future planned assumptions. By collaborating and building relationships this process was integrated into Claims as well as Sales & Service, LV= has enjoyed a 20-30% increase in Claims service levels plus a sector-beating 86% customer satisfaction score. These activities have been complemented by enhanced lifestyle shift options and homeworking – the latter set to grow to 300 staff in 2014.
Innovation Awards Finalists

Neopost – Speech analytics gets impressive results
See how analytics increased the speed and reliability of decision making and focussed delivery of improvements in areas of importance for colleagues and customers. Since gaining speech analytics, Neopost have been fast off the block in creating 90 data categories and using these to address customer issues, supporting a 7% rise in employee engagement within their Contact Centres. Early analysis demonstrated the need for a radical change to account statements and, after these changed, calls of this type have dropped by nearly a quarter. On the Crediton service, analysis showed that the product was not well understood by advisors or clients. ‘Hold time’ has come down 27%, because of new support materials and training, and there is now a strong focus on client education. Another critical area has been the use of positive or negative language within the call; the advisor scorecard has been redesigned to include this information and team leaders are supporting advisors in how to speak more effectively with customers.

Santander – vScreen for credit card operation
See how Santander’s contact centre sales team use vScreen technology for credit card applications, delivering cards to customers 12 days earlier. Santander has successfully used vScreen secure, compliant, web-based sessions to guide customers through applying for a credit card in real time. This replicates the face-to-face sales process and makes the customer journey significantly easier for customers using the phone – and much more personal. Agents are able to guide customers through product information to ensure they choose the right card product for them. The customer is also able to read and understand T&Cs, whilst providing a digital signature in real time. This in turn streamlines back office operating processes. Customer feedback has been 95% positive. Crucially this project involved a range of departments: legal, fraud, customer engagement and marketing as well as contact centre agents working together to make it happen. It operates on the agent’s standard browser without additional software or IT implementation.

TalkTalk – Natural Language Call Steering
Discover how partnership working and stakeholder engagement have been vital in helping TalkTalk move its interactive voice response (IVR) from touch-tone to natural language. With the aim of simplifying the customer journey, TalkTalk’s IVR and Telephony Team decided to invest in a natural language call steering IVR solution with a view to simultaneously reducing business costs and improving the customer experience. Nuance Communications was selected to implement a proof of concept, and partnership working commenced to collaboratively design the tool and agree KPIs. To ensure success, TalkTalk’s commercial, IT, legal, training, MI, analytics, planning and advisor teams were engaged to provide customer insight and identify self-serve and automation opportunities. This approach led to a highly successful pilot, with results including 94% speech recognition accuracy, a 16.2% reduction in agent transfers, without introducing complexity and falling out of design best practice. Full roll-out is now ongoing, incorporating an integrated technical support model and account and billing application.

Three – Demand Management Transformation
Utilising effective employee engagement to drive business improvement in an Onshore/Offshore environment. A group, led by the Service Demand Planning team at Three, identified, created and steered project teams to plan for market growth without a corresponding rise in staffing. By identifying opportunities for improvement within service delivery to customers, IVR navigation and self-service, demand for resource has reduced. Furthermore, new shift patterns allowed for more effective resource utilisation. Key to success was the collaborative approach that helped frontline employees, in a mixed onshore – offshore operation, feel part of the change by involvement in solution design pre and post implementation. The project has been successful achieving 55% reduction in IVR journey time, 75% increase in use of IVR self-care, 29% in post call wrap time which culminated in occupancy improvements equivalent to 122 FTE (£1.3 million).

UPC – Planning end to end
How planning took the lead in the operational delivery of a new product and how the lessons learned are leading to a new way of working. The planning team at UPC broke down siloes between department and ensured the smooth and efficient running of both web sales and field service so that every customer touchpoint was planned, including IVR, for the new Horizon TV HD+ service. This end-to-end framework which supported the launch continues to this day. Self-install delivered up to 8% more than the 80% planned, allowing for more contact for customers who required help. Because management bought into and understood the impact of the model, KPIs across all functions could be aligned. There was extensive engagement with all stakeholders face-to-face, which is ongoing on a weekly basis. In this way, business-wide metrics are tracked cross-functionally. This methodology has been adopted as best practice by other parts of the global group.
Webhelp UK – Insight and Discovery
Hear how Webhelp UK has scientifically brought data and people together to drive continuous improvement, delivering quantifiable improvements in customer, colleague and client experience. The outsourcer’s holistic and agile approach sees it analysing data from multiple sources to derive a 360° view of clients’ business and customer contact across all channels. A suite of 15+ bespoke solutions – each based on scientific methodology – are then scrutinised and, where appropriate, applied to deliver quantifiable year-on-year improvements. One such solution is ‘Discovery’, which places frontline advisors in a heavily supported ‘lab’ environment where they can challenge and test different approaches to customer management for their client based on a specific theme. Using this one powerful solution alone, Webhelp UK has increased sales revenue 284%, reduced call volume 53% and improved client net promoter score (NPS) by 30% across its client-base.

WorldPay – SHINE: The Quality Programme
A customer-led approach to quality drove NPS from 46 to 67 and encourages root cause analysis to continually improve customer satisfaction. WorldPay implemented Shine, a new points-based quality programme to improve the customer experience and put quality as the focus for the organisation from the top down. A dedicated quality team audit c.1000 calls, double the previous rate. They provide tailored, meaningful coaching to each advisor, within 24 hours of contact. The focus on quality is coupled with an incentive programme for colleagues and teams, adding in a crucial element of competitiveness, which improves team morale and engagement. There has been a step change in performance, with an increase each month since inception from 55.5-61.5 in four month. NPS has risen from 46-67 and AHT is down 11%. Because Shine is linked to root caused analysis, there is a cycle of continual improvement.
Innovation Award Judges

Experienced external judges, together with experts from the Planning Forum, visit finalists on-site, to meet with agents, managers and others affected by the changes – to individually assess the scope and impact of each innovation.

Richard Abdy
Richard is currently Resource Planning Manager at NE Ambulance Service, with 15 years planning experience in finance, telecoms and the public sector. Previously at the NHS Business Services Authority, he was an Innovation Award finalist in 2010 and winner in 2003 at T-Mobile.

Emma Botfield,
Emma is Head of Customer Services at Transform Sandwell, a joint venture between BT and Sandwell Council. With over twenty years’ customer service experience, Emma is an accredited Six Sigma Black Belt, NLP Diploma holder & ILM Level 7 Coach.

Carl Bowles
Award winner in 2012 with npower, Carl supports the Customer Services operation in the resource planning, MI, Technology, Insight and QA disciplines. With over 20 years in the industry he has a wealth of experience gained within several industry sectors.

Richard Brimble
Richard, a European Call Centre & Customer Service lifetime achievement award winner in 2013, has advised companies on bringing about improved communication, customer experiences and results. Richard is co-author of Understanding – Keeping the Human Factor Alive in the Digital Age. He is Director of Organisation Development for Affinity Water.

Simon Butler
Simon is Planning Manager at DLG, incorporating brands such as Direct Line, Churchill, GreenFlag & Privilege. Winner of the Innovation of the Year award in 2012, and Planning Hero Award in 2013 Simon is actively involved in promoting planning professionalism both at DLG and in the wider industry. He is currently supporting business strategy using planning disciplines to help deliver next generation customer service excellence in an omni-channel environment.

Scott Clifford
Scott is Head of Customer Service Support for Tesco Bank Insurance, the team was one of the first to be business accredited by the PPF and has been an active member since the creation of Tesco Bank in 2010.

Ally Gray
Ally is the Head of Call Centre Architecture at RESPONSE and was an Innovation Award Finalist when with Scottish Gas in 2011. His previous experience includes Head of Operations in RESPONSE in addition to senior roles at HSBC and Scottish Gas in forecasting and planning.

Jonathan George
Over the past 19 years Jonathan has been working for a number of organisations including SpecSavers, General Electric, AXA Assistance and the RAC to develop and establish Contact Centre Services. He has received a Planning Hero Award and has lead both Specsavers and WhiteConcierge (Part of the AXA Assistance group) to be placed fifth in the Top 50 Call Centres for Customer Service and Top 50 companies for Customer Service respectively.

Sven Hill
Sven is Online Measurement Manager at Belron®, incorporating brands such as Autoglass® in the UK and their equivalents in over 30 countries worldwide. Winner of the Innovation of the Year award in 2011, Sven is actively involved in combining Planning and Analysis best practice to deliver a consistent and excellent Customer experience across all channels.

Matt Kemp
Matt is Director of Customer Services for Lebara, responsible for delivering exceptional experiences to over 3.5m customers in eight countries. He has over 15 years’ experience in contact centre management across multiple industries. At Lebara he has implemented a full transformation programme within Customer Services, successfully managing the integration of state-of-the-art Contact Centre technology and reporting suites.

Chris Kenny
Chris is Improvement Manager with Avios (BA). With over 13 years Resource Planning Experience within Travel, Loyalty and Finance he specialises in creating a leading multi channel customer experience, driven by the customer and supported by technology, people and process. Chris was a finalist in the 2013 innovation awards for the Avios Web Centre.
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**Peter Massey,**
Managing Director at Budd and chairs the UK’s Chief Customer Officer forum. His work has been focusing on how companies cause customers to contact them: “How do we stop doing dumb things to our customers and people?”

**Nick Moule**
Head of Planning at Capita (Customer Management Division) and works with multiple clients across several industry sectors. Overseeing the Planning cycle for over 30 clients comprising over 13,000 FTE across 15 sites, Nick’s on and offshore team has recently been working on new client wins, transitioning TUPE’d operations and planning teams into Capita. His team is also actively involved in the transformation programmes.

**Simon Rider,**
Head of Operational Support & Development at UKAR and a previous Innovation Award finalist. Simon has 17 years’ experience leading the implementation of creative and innovative solutions in Performance Management, Customer Experience, Quality Assurance and Continuous Improvement.

**Keiron Sanders**
Deputy Director of HMRC Personal Tax Operations and has direct responsibility for all the Teams who carry out the Resource Planning and Performance Forecasting within the Department. The main focus of Keiron’s Team is to ensure a robust plan is in place to enable successful delivery of our business targets both in the short and long term.

**Ivan Smith**
Support Services Department Manager for Motability Operations, leading four teams: MI & Forecasting, Training, Coaching & Quality and Communication & Knowledge Management. Winner of three innovation awards over the past two years, Ivan has over 15 years’ experience in the industry and is passionate about best practice, employee engagement and customer experience.

**Julie Warne**
Responsible for the Customer Contact Centre at Carnival UK, for both P&O Cruises and Cunard for the UK and EMEA market. Julie was a recipient of a 2012 Planning Hero Award and is a true ambassador of creating loyal customer relationships by putting people at the heart of the organisation.

**Anita Yandell-Jones**
Senior Manager in the contact centre industry for 15 years. Currently responsible for various functions within the business, her primary responsibility is to drive and support business improvements & development within DAS. Anita was recognised with a planning hero award in 2011.

What the judges said about the judging process:

“**It was a great opportunity to learn from experts … and to meet like-minded people who are trying to push this industry forward**”

Richard Brimble, Director of Organisation Development, Affinity Water

“**It’s great to hear the other judges’ enthusiasm and see a nomination from a different perspective.**”

Anita Yandell-Jones, Operations Solutions Manager, DAS

“**[The Innovations] are expanding way beyond contact centres.**”

Sven Hill, Online Measurement Manager, Belron® UK Ltd

“**The finalists demonstrated a prominent theme of continual improvement, be that in planning, process or cost control … and the importance of engaging people from right across the enterprise to achieve your goal**”

Carl Bowles, Centre Support Manager, npower