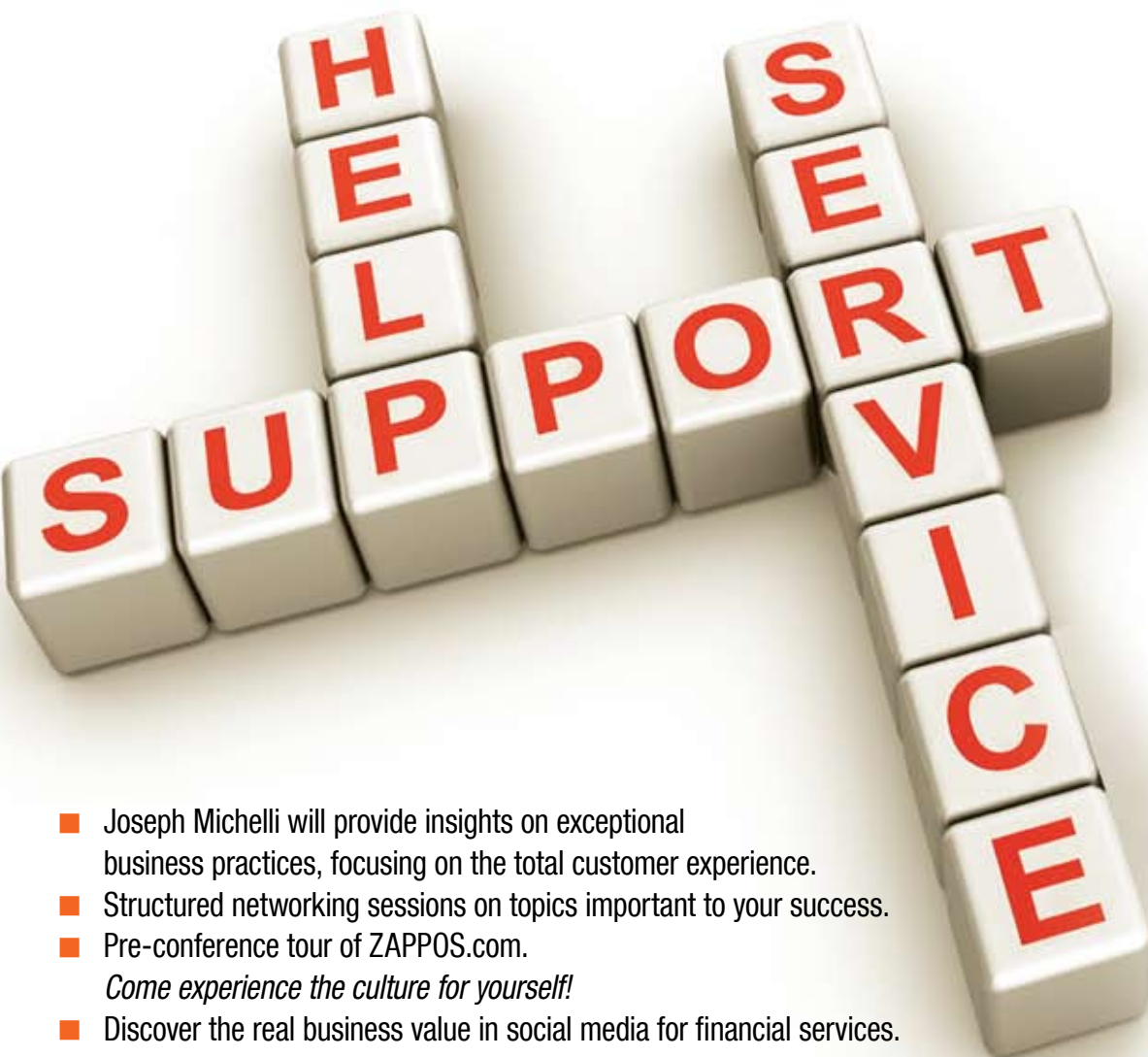


# LOMA Customer Service *Conference*

*Creating a Culture of Service*

March 14-16, 2012  
The Mirage  
Las Vegas, NV



- Joseph Michelli will provide insights on exceptional business practices, focusing on the total customer experience.
- Structured networking sessions on topics important to your success.
- Pre-conference tour of ZAPPOS.com.  
*Come experience the culture for yourself!*
- Discover the real business value in social media for financial services.

**Bonus  
Event:**

**Come tour Zappos.com!**

Join us on the Zappos Insights tour which will give you an opportunity to see this outstanding firm's unique service-oriented culture in action!



# 2012 LOMA Customer Service Conference



Nothing succeeds like success, and when your company succeeds at service your customers are happy, sales increase, and you strengthen the bottom line.

LOMA's Customer Service Conference will show you how to develop a culture of service that will enable your firm to stand head and shoulders above the competition. The exciting lineup of speakers and topics has been carefully designed to deliver only the best to you... the best information, the best strategies and the best tactics that will help you get the job done.

## We'll be looking at:

- Unclaimed insurance benefits for life and annuity insurers.
- Engaged team performance for process and performance improvement.
- Social media and its impact on your operations.
- Leadership development and succession planning.
- And much more!

PLUS you'll find outstanding networking opportunities with other attendees and speakers as well as with our sponsors and exhibitors.

## Who should attend? You! If you are in:

- **Customer Service** – you'll find a plethora of ways to stay ahead of the competition and create a culture of service throughout your organization.
- **Marketing** – you'll learn ways to use customer service to reach your customers and increase sales.
- **New Business** – you'll see how your service center can bring in new customers.
- **Operations** – you'll find new, efficient ways of building cost-effective and productive centers.
- **Claims** – you'll discover ways of working with – and delighting – customers that will help you retain their business and turn them into evangelists for your company.
- **IT** – we'll show you new products, services, and systems that will help your call center run smoothly, efficiently, and economically.

**Thank you to our  
Sponsors and Exhibitors**



**Exhibit and Sponsor Opportunities are Available.**

For More Information Contact:

Marvin Jones  
770-984-6459  
jonesm@loma.org  
www.loma.org/csc.asp

## Featured Speakers

### Joseph Michelli



Our keynote speaker is an internationally sought-after author and organizational consultant. Michelli will relate his knowledge of exceptional business practices and describe ways to develop joyful and productive workplaces with a focus on the total customer experience. His insights encourage leaders and frontline workers to grow and invest passionately in all aspects of their life.

You can learn more about Michelli at [www.josephmichelli.com](http://www.josephmichelli.com).

### Brad Cleveland



A well-known thought leader on customer interaction, he will discuss *Shaping Your Customer Access Strategy for Social Media*. Cleveland has worked with many of today's service leaders including Apple, HP, American Express, USAA, and others. He has discussed customer service issues in publications ranging from *The Financial Times* to *The Wall Street Journal* and has appeared

on major television networks, NPR's *All Things Considered*, and the in-flight programs of several airlines. Cleveland is a founding partner and former President and CEO of the International Customer Management Institute (ICMI), growing the firm into a global industry leader that is now part of United Business Media (London: UBM.L). You can learn more about Cleveland at [www.bradcleveland.com](http://www.bradcleveland.com).

## Bonus Opportunity!



Pre-conference tour of Zappos in Henderson, NV.

March 14 at 2:00 p.m. or March 16 at 12:00 p.m.

Cost: \$125

Can life really be that great at work? Come experience the culture for yourself! The Zappos Insights tour offers the opportunity to learn how to create a strong culture where people love to work with service that WOW's customers. Join us for this special bonus event . . . a can't-miss 60 minutes that will give you an opportunity to see the world-famous Zappos.com culture in action!

Plus . . . after our tour, we will spend an hour with a Zappos executive who will share how their culture has made Zappos an industry leader.

### For Additional Information

To learn more, contact:

Marvin Jones, ALMI, ACS  
Senior Associate, Management Solutions  
LOMA

(770) 984-6459

E-mail: [jonesm@loma.org](mailto:jonesm@loma.org)

Or visit the conference web page at [www.loma.org/csc.asp](http://www.loma.org/csc.asp).



## Wednesday, March 14

12:00–7:00 p.m.	Registration/Information
2:00–5:00 p.m.	ZAPPOS Pre-Conference Tour
6:00–7:00 p.m.	Welcome Reception

### Evening

Dinner on your own. Enjoy Las Vegas!

## Thursday, March 15

7:00 a.m.–4:00 p.m.	Registration/Information
7:00–8:00 a.m.	Networking Continental Breakfast with Exhibitors
8:00–9:30 a.m.	General Session Joseph Michelli
9:30–10:00 a.m.	Networking Refreshment Break with Exhibitors
10:00–10:45 a.m.	Structured Networking Sessions

Come prepared to learn from and share with your peers on these pressing issues within our industry.

**1.1 Self-service Models: How can I help you to better help yourself?**

**1.2 Collaboration Tools: Can we all just work together?**

**1.3 2012 and Beyond: The current and future state of the call center.**

**1.4 Customer Experience: The holistic approach.**

10:45–11:00 a.m.	Networking Refreshment Break with Exhibitors
11:00 a.m.–12:00 p.m.	Concurrent Sessions

### 2.1 Engaged Team Performance in a Call Center

**Sarah Brethower**

*Consultant, Implementation Partners*

**Dodd Starbird**

*Managing Partner, Implementation Partners*

Technology has revolutionized business processes for contact centers, using data to drive significant improvement in performance. But technology is only one part of the formula. To complete the equation, you must add process and performance improvement. Engaged Team Performance (ETP) integrates those concepts into a single method that significantly improves productivity and effectiveness without substantial technology investments.

Come learn the core concepts of the ETP approach, illustrated with a story from the Easy to Do Business (EZB) Project at the Principal Financial Group. This project improved operational efficiencies and effectiveness by sharing work and capacity between a contact center and an operational production team.

### 2.2 Hiring and Managing Gen Y and Overqualified Applicants in Today's Economy

**Nancy Godin**

*Manager, Contact Center Initiatives Customer Interaction Services, Foresters*

**Malcolm McCulloch**

*Senior Research & Market Consultant, Assessment and Development Solutions, LIMRA*

Customer service centers in the financial services industry face new challenges as they draw on two emergent talent pools: members of Gen Y and overqualified-but-unemployed individuals with no call center experience. Hiring managers ask:

- Will they have the right skills and personal characteristics?
- Will they fit into my center's current work group?
- Will they leave when the economy turns around?

This session will review the work characteristics of these two groups and provide a research-based procedure to hire and manage them like any other group of reps.

### 2.3 Unclaimed Insurance Benefits for Life and Annuity Insurers

**KPMG Presenter TBD**

Rules are unclear as to what life or annuity insurers must do if the policyholder dies and a death claim is not received, or when an annuity is still in the payment phase but the beneficiary cannot be located. Due to the economic climate, state governments have become aggressive in attempting to collect unclaimed insurance benefits. Also, many states have limited or no statute of limitations for unclaimed property. Join us as we discuss the wide-ranging issues surrounding this important topic.



12:00–1:15 p.m.

Conference Lunch and Networking

1:15–2:15 p.m.

Concurrent Sessions

### 3.1 Analyzing Interaction Data to Transform the Customer Experience

**Mike Cochran**

*Vice President, Financial Services, Mattersight Corporation*

Join us to discuss Behavioral Analytics, a managed service that enables your company to completely transform the customer experience. By utilizing the right metrics and improving where and how to capture and analyze data, Behavioral Analytics provides an innovative approach that leverages unstructured customer and employee interaction data and transforms it into actionable business insight.

You will learn about:

- Where and how to capture data that is unsolicited yet relevant and meaningful.
- How to leverage Behavioral Analytics across multiple channels – voice, text, email, desktop – to improve operational transparency and predictability.
- Why understanding the data leads to an improved customer experience.
- Improvements major insurance and financial services companies have seen.

### 3.2 Thrivent’s Work from Home Model and LOMA Virtual Worker Tools

**Jennifer Debruin**

*Manager, Member Interaction Center, Thrivent*

**Nicole Overmeyer**

*Marketing Coordinator, Management Solutions, LOMA*

Thrivent Financial launched a telecommuting program as a pilot in 2001 and has continued to grow the structured program since. Thrivent currently has 35% of its Annuity, Mutual Fund, and Insurance Call Center staff working from home. This has decreased employee turnover, increased engagement, provided the ability to maintain a business continuity plan, and increased scheduling flexibility with the on-call program.

Learn how Thrivent implemented and refined its work from home program, overcame common misconceptions of employee performance through the use of metrics-measuring technology, and positioned telecommuting as a primary option for workforce management.

### 3.3 Practice Makes Perfect ...

#### A Real Life Case Study in Disaster Recovery, Situational Leadership and Courage

**Cheryl Kusick**

*Director, Customer Service, ING, Retail Life*

**Lora Soderholm**

*Operations Director, ING, Retail Life*

2:15–2:30 p.m.

Networking Refreshment Break with Exhibitors

2:30–3:30 p.m.

Concurrent Sessions

### 4.1 The Forgotten Touch Point

**Kathy Biver**

*Manager, Internal Projects Initiatives, MTL*

**Lori Gelter**

*Program Director, Cincom Document Services*

When you think about customer communications in life insurance, web sites, agents (in-person), and contact centers typically come to mind first. But what about document communications? From capturing customer data and creating illustrations to generating policies, document communications still account for the majority of policyholder interactions in life insurance.

Attend this session to see how MTL Insurance is taking a more focused approach to integrating document communications into their multichannel strategies to improve the overall customer experience.

### 4.2 Social Media in Insurance: Managing It All and Delivering Value to Customers

**Jennifer Wilson**

*Solutions Marketing Manager, Interactive Intelligence Inc.*

Ever look to Facebook for insight on a product before making a purchase? Or tweet an opinion of a company? Many of your policyholders are. What are they saying about your company? Are you listening? Social media has become an emotional outlet for both praise and frustration that carriers cannot afford to overlook. Learn how proactive monitoring and response to this growing communications channel can lead to improved customer service and more personalized relationships with insureds, agents, and third parties.

### 4.3 How to Eat the Six Sigma Elephant...One Bite at a Time!

**Erik Simmons**

*Vice President, BPM/Continuous Improvement, Ameritas – A UNIFI Company*

**Angel Domaschko**

*Manager, New Business Process, Ameritas – A UNIFI Company*

How much time, energy and money do you waste putting out process related fires? Lean Six Sigma/Continuous Improvement is about putting out major fires permanently. Learn how Ameritas began its improvement journey by adopting the principles of Lean Six Sigma, and what continuous improvement tools you can start using today to capture measurable results. In this session you will:

- Gain a greater understanding of how Six Sigma/Continuous Improvement principals can enhance corporate culture.
- Become familiar with continuous improvement tools you can use to improve quality, business processes, and cost reduction.
- Learn the DMAIC Methodology: The five required phases of a Six Sigma project.

**3:30–4:00 p.m.**      **Networking Refreshment Break with Exhibitors**

**4:00–5:00 p.m.**      **General Session**

**Leadership Development Panel Discussion:**

Who should I consider? Where should I look within my organization? How can I develop the next “Me”?

#### Panel Participants

**William Frazee**

*Assistant Vice President Life Operations,  
John Hancock Life Insurance Company*

**Andrew Noon, Ph.D.**

*Manager, Learning and Development, Mutual of Omaha*

**Paige Scott**

*Assistant Vice President,  
Group Administration and Operations, MetLife*

#### Evening

**Dinner on your own. Enjoy Las Vegas!**

## Friday, March 16

**7:00–8:00 a.m.**      **Networking Continental Breakfast with Exhibitors**

**8:00–9:00 a.m.**      **General Session  
Brad Cleveland**

**9:00–9:15 a.m.**      **Networking Refreshment Break with Exhibitors**

**9:15–10:15 a.m.**      **Concurrent Sessions**

### 5.1 Holistic Service: Enhancing the Customer Experience from the Ground Up

**Simon Leech**

*Senior Vice President of BPO and  
Customer Experience Programs,  
American General Life Insurance Company*

**Bob McDonald**

*Principal Management Consultant, CSC*

To increase customer retention, loyalty, and company growth, the customer experience has to be front and center. Policyowners' expectations are increasingly high as they demand reliable, predictable and results-oriented service; access to their information 24/7; and immediate answers.

It is crucial to improve customer touch points across all channels, from low-tech mail and human interaction to the Web and mobile access. At this session you'll learn how a top-50 life insurer secured customer loyalty in the wake of a challenging environment by launching strategic, innovative initiatives resulting from customer feedback.

### 5.2 Mobile Computing in the 21st Century

**Steve Murphy**

*Senior Consultant, Robert E. Nolan Company*

**Gerald Shields**

*Consultant, Robert E. Nolan Company*

We present a case study and a framework for planning, deploying, and managing mobile technology in a service environment. The framework consists of three components: Strategic Positioning, Mobility Schemas, and a Capabilities Model, which allow an insurance company to define the assets necessary to successfully implement and support mobile applications.

After attending this session, audience members will be able to:

- Describe a model for managing mobile technology.
- Evaluate alternatives for deploying mobile functionality across disparate platforms.
- Describe how other companies are managing mobile technology.

### 5.3 Social Media and Customer Service — If Not Now, When?

**Terry Golesworthy**

*President, The Customer Respect Group*

In this session Golesworthy will provide an overview of where we are as an industry with specific insight into how social media can and should be part of your customer service initiative. Social media will be a key customer service opportunity in your organization, but if not now, when?

**10:15–10:30 a.m.**      **Networking Refreshment Break with Exhibitors**

**10:30–11:30 a.m.**      **Structured Networking Sessions**

Come prepared to learn from and share with your peers on these pressing issues within our industry.

### 6.1 Social Media and the Customer Experience: The New Power Couple

### 6.2 Mobile Technology: Do You Have an App for That?

### 6.3 Business Intelligence: How Are You Using the Data that You Have to Enhance Service?

**11:30 a.m.**

**Conference Adjourns**

### Registration & Fees

#### Register by February 17, 2012 and Save!

LOMA member: \$995  
LIMRA (Not LOMA) member: \$1,240  
PCS designee: \$895  
Non-member: \$1,480

#### Register after February 17, 2012

LOMA member: \$1,095  
LIMRA (Not LOMA) member: \$1,340  
PCS designee: \$995  
Non-member: \$1,580

### Discounted Group Registration Fee

#### Full Conference Registration

If three or more employees from the same member company register for this event, they can qualify for our group discount.

Three (3) or more employees from the same member company:  
\$895 per employee by February 17  
\$995 per employee after February 17

**Note:** Discount available for full conference registrations only. Presenters and registrants using other discount offers also do not qualify for this offer and should not be included in any "3 or more" count. Discount eligibility is contingent upon the member company meeting the "3 or more" criteria. Employees from member companies failing to meet this criteria will be billed any balance due based on the difference between the regular and group discounted rates.

### How to Register



#### Online

Register at [www.loma.org/csc.asp](http://www.loma.org/csc.asp).



#### By Mail or Fax

Download the registration form from [www.loma.org/csc.asp](http://www.loma.org/csc.asp).

Mail the registration form to:  
LOMA, Meetings Department  
2300 Windy Ridge Parkway, Suite 600  
Atlanta, GA 30339-8443  
(Requires payment by check, credit card or wire transfer.)



Fax registration form to:  
LOMA's Meetings Department at (770) 984-6419  
(Requires payment by check, credit card or wire transfer.)

### Bonus Opportunity!

Pre-conference Tour of Zappos in Henderson, NV  
March 14 at 2:00 p.m.  
Cost: \$125



### Hotel Information

The Mirage  
3400 Las Vegas Boulevard South  
Las Vegas, Nevada 89109

#### Hotel Reservations Special Group Rate:

\$159 + 12% tax

#### Cut-off date:

February 17, 2012

To receive the discount:

Make your reservations before the cut-off date by calling the hotel directly at 800-499-6311 or 702-791-7444 and mentioning LOMA.

The resort fee was reduced to \$5 + 12% tax for this program. This fee includes guest room internet access. The group rate is available until February 17, 2012 or until the blocked space is sold out. Check-in time is 3:00 p.m.; check-out is at 12:00 p.m.



#### Attire

The dress code for this conference is business casual.

#### For More Information Contact:

Marvin Jones, ALMI, ACS  
Senior Associate, Management Solutions  
LOMA  
(770) 984-6459  
E-mail: [jonesm@loma.org](mailto:jonesm@loma.org)  
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## Conference

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