

Interactions '10 Agenda

LEGEND:

Track 1: Business Value	Track 2: Real World Successes	Track 3: Technology Advances	Track 4: User Education—Essentials	Track 5: Idea Exchange	Track 6: User Education—Advanced
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Tuesday, May 4th

7:30am-8:30am	Breakfast												Longhorn Hall E
8:30am-8:45am	Welcome to Interactions 2010				Steve Sullivan, CEO, NICE User Group, Debbie May, President, IEX Workforce Management Group, Yochai Rozenblat, CEO and President, NICE Americas				Texas A & B				
8:45am-9:05am	Opening Remarks				Zeevi Bregman, Chief Executive Officer, NICE Systems				Texas A & B				
9:05am-9:45am	Take Charge of Your Customer Dynamics!				Udi Ziv, President, Enterprise Product Group, NICE Systems				Texas A & B				
9:45am-10:05am	Break												Center Prefunction
10:05am-10:40am	Winning When Our Customers Win				Randall King, SVP eChannels & Customer Solutions Executive, Bank of America				Texas A & B				
10:40am-11:20am	Putting Customers First				Jeffrey Hayzelle, CMO, Eastman Kodak				Texas A & B				

BREAKOUTS

	Business Value			Real World Successes			Technology Advances		User Education - Essentials		Idea Exchange	User Education - Advanced	
	Texas 1	Texas 2	Texas 3	Texas 4	Texas 5	Texas 6	San Antonio 1-3	San Antonio 4-6	Austin 1-3	Dallas 6-7	Texas C	Dallas 1-2	Texas D
11:30am-12:30pm	Those Terrific Telecommuters Andressa Marian (NICE)	It's All About The Sentiment – Manage Your Customers' Experience Across All Interaction Channels Beeri Mart, (NICE)	Applying Six Sigma to Maximize Your ROI from Interaction Analytics Amerigo de Vera (TSYS) Dr. Vasudeva Akula (NICE)	Ensuring Your Quality Program Drives Business Results Beth Casebolt (JPMC) Charlene Gillam (NICE)	NICE Customer Excellence Award Recipients: Julie Cole & Janet Pawlowski (American Airlines) TBD (Phillips Respironics)	NICE Customer Excellence Award Recipients: David Frame (Alconnect, Inc) Lisa Brewer (Cigna)	IEX WFM Release 4.2 ODBC and SmartSync – What's Different? Meghan Barni (NICE)	Recording in Avaya Environments – Supporting Your Avaya Aura Roadmap Uri Frieder (NICE) Donna M. Holt (Avaya)	IEX WFM Forecast Algorithms Rachael Smith (NICE)	IEX WFM 4.2 for Staff Plan & Weekly Plan Users - What's Different? Linda Tracy (NICE)	Open Forum: Managing the Workforce Managers Facilitated by Randall Sellnow (Optum Health)	Performance Reporting or Performance Management: What's the Difference? Jeff Williams & David Lambert (NICE)	IEX WFM Real Time and Historical Adherence Ashlie Graham (NICE)
12:30pm-1:30pm	Lunch												Longhorn Hall E
1:30pm-2:30pm	Attention QA & Training Specialists! There's an Association Out There Just for You! Vicki Herrell (SWPP)	At Your Fingertips: Addressing Hot Topics as they Happen Julie Cole & Janet Pawlowski (American Airlines) Pnina Veisberg (NICE)	To Upgrade or not to Upgrade: The Benefits of Interaction Analytics Barb Bleiler (WPS) Suzanne Launer (NICE)	Productivity And Quality – Who Says You Can't Have Them Both? TBD (Harte-Hanks)	NICE Customer Excellence Award Recipients: Rae Ann Gonzales (GoDaddy) Les Turner (Portland General Electric)	NICE Customer Excellence Award Recipients: Alexander Wareham & Vicki Banner (Fiserv) Carolina Borges Mendes (Contax)	IEX WFM Release 4.2 Upgrade: Technical Decisions Joe Day (NICE)	Always-On Recording: Planning for High Availability and Business Continuity Ziv Grinberg (NICE) Fred Walker (EMC)	Workforce Management Fundamentals Brandi Malatesta & Caroline Giresi (NICE)	IEX WFM Change Management Fundamentals Greg Budde (NICE)	Open Forum: Forecasting and Planning Practices Facilitated by Linda Potter (AAA South)	IEX WFM 4.2 Supervisor WebStation: The Toolkit Expands Connie Yount (NICE)	Empower Your Organization With IEX WFM WebStation (part 1) Ryan McGuire (NICE)
2:45pm-3:45pm	Teaching Agents, Supervisors, and Executives about Workforce Management Rick Seeley (Convergys) Maggie Klenke (The Call Center School)	Real-Time Guidance- Driving Compliance, Operational Efficiency and Sales Effectiveness in Real-Time Preston Moore and Al Eshel (eglu)	Small & Medium Businesses (SMB) & Goldlocks – Where Everything is Just Right Yossi Teichman (CSG) Nadav Doron (NICE)	Improving First Call Resolution with Desktop and Speech Analytics Anja Dingman (Sallie Mae) Peter Thompson (NICE)	Telling the Story: The Visual Depiction of Workforce Planning Data and Implementing "Guided Analytics" Jon Johnson (GM OnStar)	Are there Industry standards in WFM? And the survey says... Vicki Herrell (SWPP)	IEX WFM Release 4.2 Upgrade: Implementation and Support Randy Price, Mike Darby, Todd Ramsey, & Rebecca Brady (NICE)	SIP is Here - IP Call Recording with Session Border Controllers Jim Donovan (Acme Packet) Uri Frieder (NICE)	IEX WFM Short Cuts & Job Aids Ashlie Graham (NICE)	NICE Recording and QM - Query Tips and Tricks Eric Gantwerk (NICE)	Open Forum: Schedule Generation Practices Facilitated by Anne Healy (LLBean)	Back Office WFM/PM & Front Office Desktop Monitoring Brenda Hansen & Paul Leamon (NICE)	Empower Your Organization with IEX WFM WebStation (part 2) Ryan McGuire (NICE)
4:00pm-5:00pm	IEX WFM Release 4.2: What's in it for the User Kris Hendrex & Sandee Vargas (NICE)	Customer Retention – How You Can Leverage Interaction Analytics To Proactively Identify Customers At High Risk of Churning Eric Alan Johnson (AnswerOn) Shevy Levinstein (NICE)	Everything is Changing: How to Plan in This Crazy Environment Steve Gordon (Hyatt Corporation) Ric Kosiba (Bay Bridge Decision Technologies)	The Top 3 Ways Interaction Analytics Can Enhance Contact Center Training: A Case Study Laura Nichols & Brandon Whiting (Salt River Project) Ben Goltz (NICE)	Increasing Customer Retention While Improving Operational Efficiency Kimberly Koury (Electric Insurance Company) Tara Mitchell (NICE)	Putting it All Together: Tangible Benefits of NICE Interaction Analytics + Feedback + IEX WFM as an Integrated Solution Suzanne Rapiet (Liberty Mutual)	IEX WFM Release 4.2 Upgrade: Pre and Post-upgrade Activities Jeffrey Rogerson (NICE)	Empowering IT To Maximize Value To Business Users With Interaction Analytics Beeri Mart (NICE)	IEX WFM Schedule Generation: Understanding and Working With It Rachael Smith (NICE)	Multi-channel Communications: Challenges and Best Practices Macklin Martin (ICMI Consulting)	Open Forum: IEX WFM Change Management Practices Facilitated by Jon Johnson (OnStar)	IEX WFM 4.2 Time Off Manager: New and Improved Connie Yount (NICE)	Intelligent Outbound List & Campaign Management Bill Andrews (ALI Solutions)
7:00pm-10:00pm	Welcome Reception												Center Prefunction

THOSE TERRIFIC TELECOMMUTERS

Andressa Marlan, Solutions Engineer (NICE)

Telecommuting makes intuitive sense. We know about the upside of helping agents achieve a better lifework balance through flexible schedules and reduced commute times. And you already know the value an extremely flexible workforce could deliver to the business. But how do you integrate these offsite agents into the contact center? How do you manage their training and learning? How can you ensure they respond effectively to customer needs regardless of location? How do you build a human networking environment to help ensure that no one feels left behind? Join us in this session as we talk about what is and isn't working in the virtual at-home agent environment. We will discuss how to keep at-home agents satisfied and motivated by helping them feel included in a team. We will also discuss how to ensure at-home agents receive effective and timely training and coaching. And we will discover how to leverage the flexibility of telecommuting agents for creative and highly efficient scheduling.

TEACHING AGENTS, SUPERVISORS, AND EXECUTIVES ABOUT WORKFORCE MANAGEMENT

Rick Seeley, Senior Manager RPM (Convergys) and Maggie Klenke, Founding Partner (The Call Center School)

Many people in the contact center view the workforce planning and management process as confusing, if not downright mysterious. Frontline staff may not understand how they ended up with a schedule they didn't want, senior management may not understand why the ratio of staff to workload is so high, and team managers may be upset they can't schedule an impromptu team meeting. It's important to communicate and educate everyone in the call center about the process of workforce management and the role they play in it. Senior management should understand the what-if tradeoffs of staffing levels, occupancy, service, and cost. And it's vitally important for frontline staff to understand the power of one – the impact that each person has on speed of answer, occupancy, and bottom line. This session will use customer case studies to identify what each group should know and offer suggestions on how to assemble a workforce training program for the rest of the organization. Attendees in this session presented by The Call Center School will learn to:

- Identify common misconceptions about the workforce management process.
- Outline what each person in the call center needs to know about the forecasting and scheduling process.
- Describe options for explaining staffing tradeoffs and budget issues to senior management.
- Identify ways to educate frontline staff on the power of one in call center staffing.
- Identify proven practices and examples for a successful workforce management education program.

EVERYTHING IS CHANGING: HOW TO PLAN IN THIS CRAZY ENVIRONMENT

Steve Gordon, Manager of Resource & Intelligence (Hyatt Corporation) and Ric Kosiba, President (Bay Bridge Decision Technologies)

It has been a wild year for planning professionals, and all indications are that things are getting wilder still. For many organizations, forecasting has become nearly impossible. But that is just the beginning. External and, now, internal forces are shaking up our planning process and our operation. Email, chat, backoffice, and outbound calls are being intermingled with the standard inbound call center. Center networks are being consolidated, virtualized, and broadened. And it's precisely now that many contact center organizations have decided – with good reason – to significantly add to their operation. In 2010, companies plan to invest in the new technologies necessary for organizing the multitude of communication channels. However, planning for this opportunity is, yet again, more difficult. In this session, we'll use some customer case studies to discuss tips, tricks, math, and modeling ideas to help you sort through forecasting and planning for your multichannel, multiskill contact center in a crazy environment.



A PRACTICAL CHANGE MANAGEMENT MODEL THAT WORKS

Randall Sellnow, Associate Director, Workforce Management (Optum Health)

Change is always difficult, but we all know that change is unavoidable. Most of us are familiar with the staggering statistics illustrating the challenges of implementing change plans: 90% of patients in certain change or die situations refuse to make meaningful life changes; 70% of organizational change initiatives fail; and so on. Clearly, one key to implementing successful corporate change is addressing the human element – guiding employees through their emotional transitions and helping them move from a place of resistance to one of acceptance. However, an overarching operational change management strategy must also be carried out to ensure that the change is successfully implemented. This session will outline a simple three-step model that will provide a roadmap for successful operational change management that can be used in any environment – even the most highly change-resistant. Learn how OptumHealth has successfully utilized this model in complex contact center environments.

IEX WFM RELEASE 4.2: WHAT'S IN IT FOR THE USER

Kris Hendrex, Business Solutions Specialist and Sandee Vargas, Lead Business Solutions Specialist (NICE)

IEX WFM Release 4.2 brings many enhancements to the workforce management processes, but are you wondering why you should consider an upgrade? Are you having a bit of a challenge convincing your management that the benefits are worth the effort? This session will focus on user-oriented features and functionality and show how operational tasks have been streamlined throughout the workforce management cycle. Administration enhancements, forecasting improvements, scheduling refinements, and change management advancements are detailed in this session. Join us in this session to see the value delivered with this exciting software release.

Note: There are two opportunities to attend this session.

A CONSULTATIVE APPROACH TO MAXIMIZING THE BENEFITS OF NICE SOLUTIONS

Tara Mitchell, Solution Delivery Specialist, Charlene Gillam, Principal Consultant, Eric Gatwerk, Senior Education Specialist (NICE)

A wise person learns from the experiences of others. NICE's value added services offers you the opportunity to do just that. Learn how to maximize the benefits of your NICE solutions by tapping into a wealth of experience and expertise.

HOW QUALITY OPTIMIZATION AND QUALITY PLANNER CAN CHANGE YOUR LIFE

Jackie Knez, Director, Consulting, Hila Lam, Product Manager (NICE)

Quality assurance has been around for a long time, but you might be surprised to find out that something new and exciting has been added. Come and learn how NICE Quality Optimization and Quality Planner can make a major difference in how your quality process works.

FROM LEAD TO DEAL – HOW YOUR CONTACT CENTER CAN IMPACT THE TOP LINE

Beeri Mart, Product Manager (NICE)

By extracting valuable insights from customer interactions, you too can transform the Contact Center into a Profit Center. The NICE Sales Effectiveness Solution ensures that crosssell and upsell activities are as successful as possible. Leveraging the insights from multichannel Interaction Analytics, you can now effectively measure sales activity, aggregate customer objections, surface the root causes of successful or unsuccessful sales attempts, and provide the marketing department with valuable feedback about the products and services offered. The result? Higher sales.

IT'S ALL ABOUT THE SENTIMENT MANAGE YOUR CUSTOMERS' EXPERIENCE ACROSS ALL INTERACTION CHANNELS

Beeri Mart, Product Manager (NICE)

This session presents a unified process of capturing and analyzing customer interactions across all channels, all in the name of providing a consistent experience for your customers.

AT YOUR FINGERTIPS: ADDRESSING HOT TOPICS AS THEY HAPPEN

Julie Cole, Business Analyst and Janet Pawlowski, Speech Analytics (American Airlines) and Pnina Veisberg, Practice Manager (NICE)



Imagine being able to automatically identify and address the unexpected topics as they emerge in interactions. See how companies are doing just that through Interaction Analytics and understand the benefits they have obtained.

REAL-TIME GUIDANCE- DRIVING COMPLIANCE, OPERATIONAL EFFICIENCY AND SALES EFFECTIVENESS IN REAL-TIME

Noam Herzenstein (NICE)

Customers are expecting your agents to provide immediate and accurate answers to their questions. To accomplish this, agents are required to memorize scripts, understand complex business rules, and access multiple sources of customer information and knowledge bases. How can you translate this information that spans a multitude of applications into the most effective next best action in real time? See how NICE Real Time Guidance can help you enhance the customer experience, increase operational efficiency, leverage sales opportunities, and ensure regulatory compliance.

DRIVING PERFORMANCE WITH CUSTOMER FEEDBACK

Mark Angel, Principal Consultant (NICE)

Customers are the ultimate judge how well your business is serving their needs. See how the NICE Customer Feedback postcall survey solution simplifies the collection of customer opinion, provides immediate information in a way that lets you view the experience firsthand and helps you align business performance with customer expectations.

MAKE EVERY SECOND COUNT: EFFECTIVELY MANAGE HANDLE TIME FOR MAXIMIZING BUSINESS RESULTS

Hila Lam, Product Manager and Dr. Vasudeva Akula, Practice Manager (NICE)

Learn how the NICE Handle Time Optimization solution helps you to maximize both customer experience and sales performance. Gaining insight into how agent time is currently spent is the first step towards making sure it is invested in the most optimal and cost effective way going forward.

THE NEXUS OF RETENTION AND CUSTOMER ADVOCACY: THE IMPORTANCE OF A PROACTIVE CAMPAIGN TO MAINTAIN A POSITIVE CUSTOMER EXPERIENCE

Laura Nichols, Customer Service Analyst (Salt River Project) and Hila Lam, Product Manager (NICE)

Join this session to learn how Salt River Project, a perennial JD Power award winning organization, has figured it out: how to proactively provide high service levels for positive customer experience, retention and customer advocacy. They will share best practices for reaching out to unhappy customers and the technology that supports this process. We'll also review how the NICE Customer Experience solution can help your organization get to a higher level of customer relationship loyalty and advocacy.

CUSTOMER RETENTION – HOW YOU CAN LEVERAGE INTERACTION ANALYTICS TO PROACTIVELY IDENTIFY CUSTOMERS AT HIGH RISK OF CHURNING

Eric Alan Johnson, CEO, President and Chairman (AnswerOn) and Shevy Levinstein, Director of Business Integration(NICE)

Proactively identifying and reaching out to customers at risk of churning increases your customer lifetime value and the company's revenues. See how you can leverage interaction analytics to identify main reasons of customer dissatisfaction and predict which customers are at risk. We will also show how the NICE Churn Reduction solution integrates with transactional churn prediction models to significantly increase prediction accuracy.

IMPROVING BOTTOM LINE RESULTS WITH INTERACTION ANALYTICS

Rae Ann Gonzales, Manager Workforce Management (GoDaddy) and Dr. Vasudeva Akula, Practice Manager (NICE)

First Contact Resolution is one of those few key metrics, when managed well can yield improvements in many other KPIs including customer satisfaction, operational costs, revenue generation and even agent attrition. Because of these reasons, this metric has risen to the forefront of performance metrics, causing many a contact center to rethink and, in some cases, totally revamp, how they view contact center performance and success. In this session, learn how Go Daddy, the world's largest web domain name registrar, has been impacting its bottom-line results by improving their service quality and product quality by leveraging NICE's first call resolution solution along with a six sigma approach to effectively manage it.



AN OUTSOURCER VIEW: PROVIDING VALUE TO OUR CLIENTS WITH INTERACTION ANALYTICS

Simon Harrison, Customer Insight Manager (Vertex)

Business Process Outsourcers (BPO) often find themselves between a rock and a hard place – their clients (the outsourcing company) in one end, and in the other are their clients' customers (the callers). And in an extremely competitive market, the challenge of providing good service to everyone is even bigger. Join this session to learn how Vertex, a BPO, has found Interaction Analytics technology and process as a significant part of their competitive strategy, and how they use it in order to provide value to their clients.

APPLYING SIX SIGMA TO MAXIMIZE YOUR ROI FROM INTERACTION ANALYTICS

Amerigo de Vera, Manager, Customer Interaction Analytics (TSYS) and Dr. Vasudeva Akula, Practice Manager (NICE)

Six Sigma disciplines have proven to drive significant improvements in business operations. Learn from our experts on how to transform your contact centers using interaction analytics and deliver measurable improvements in the quickest and most efficient ways possible by using Six Sigma process. This session covers the overview, benefits, and critical steps involved in the six sigma DMAIC process (no six sigma background necessary) and maps the workflows embedded within the NICE solutions to this proven process for maximizing your return on investment from NICE Interaction Analytics solutions.

TO UPGRADE OR NOT TO UPGRADE: THE BENEFITS OF INTERACTION ANALYTICS

Barb Bleiler, Manager, Provider Management (WPS) and Suzanne Launer, Solution Delivery Specialist (NICE)

Follow the path of WPS to see what factors were considered while updating the recording platform to a more sophisticated automated system that leverages modern interaction analytics technology to maximize the Voice of Customer. Pause and consider the pros and cons of upgrading to a more robust system and realize the benefits and savings identified with this implementation. Initial implementation yielded substantial customer satisfaction improvements and upgrading gave WPS a deeper insight into the Voice of Customers that is enabling them to make better business decisions.

SMALL & MEDIUM BUSINESSES (SMB) & GOLDILOCKS-WHERE EVERYTHING IS "JUST RIGHT"

Yossi Teichman, CEO (CSG) and Nadav Doron, Director, NPX Product Management (NICE)

SMB's today are faced with the battle for customer intimacy. They are required to provide superior customer experience but lack the budget and findings capacity larger enterprises enjoy. Meet NICE Perform eXpress – NICE's recording and quality management solution for small to mid size organizations. Join this session to learn how NICE Perform eXpress can address your needs.

PCI AND MORE – HOW TO PROTECT PRIVACY OF CUSTOMERS AND INFORMATION WHILE WORKING IN THE CREDIT CARD ENVIRONMENT

Eran Shiff, Director of Product Management (NICE)

NICE takes a comprehensive approach to information security, ensuring that sensitive data is protected and unauthorized parties cannot compromise system integrity. This session explains how NICE's security capabilities allow businesses to comply with the latest industry regulations such as the Payment Card Industry Data Security Standards (PCIDSS), the Health Insurance Portability and Accountability Act (HIPAA) and others.

READY WHEN YOU ARE – NICE STRATEGY IN THE INFRASTRUCTURE WORLD

Ziv Grinberg, Product Manager; PM Infrastructure (NICE)

NICE is regarded as a pioneer and a thought leader in supporting state of the art information technologies. In this session we will explore developing trends in contact center technology infrastructure including cloud computing and virtualization, and NICE's strategy for supporting them.

CONNECTING THE DOTS – TYING TOGETHER TRANSACTIONS AND MULTICHANNEL COMMUNICATIONS ANALYSIS

David Geffen, Product Marketing Manager (NICE)

Data transactions and trader interactions, through phone, mobile, email, chat, and other textual means are currently separate silos within the organization, yet all are critical to

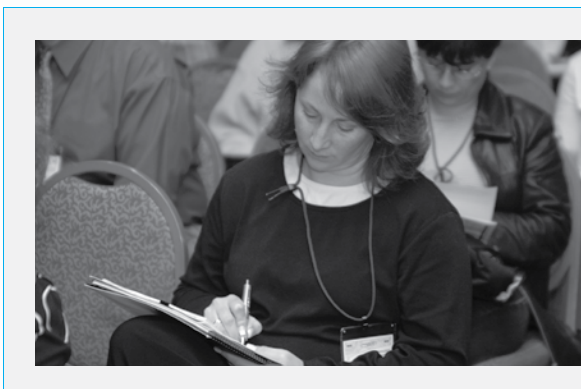
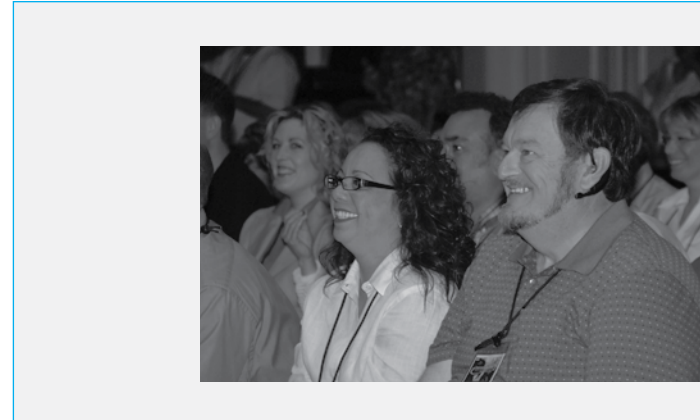


effective compliance activities. In this session, we'll discuss how your organization can improve compliance, address regulatory concerns, and improve operational efficiencies by connecting the dots between interactions and transactions.

ATTENTION QA & TRAINING SPECIALISTS! THERE'S AN ASSOCIATION OUT THERE JUST FOR YOU!

Vicki Herrell, Executive Director (SWPP)

If you haven't heard of the Quality Assurance & Training Connection (QATC), come to this session to see what you are missing out on in this association designed specifically for QA and Training specialists in the call center. And even if you are a member, sometimes when you join an organization, you just don't have the time to explore all the benefits that are provided. This session will show you what you're missing and what you need to do to take advantage of a membership in QATC. You'll learn how to get feedback from other members, find an old newsletter article, locate specific information on a topic of interest, and post a job opening on the website – just to name a few. Hear how QATC can provide you with the most important education and networking opportunities for your career.



NICE CUSTOMER EXCELLENCE AWARD RECIPIENTS:

Kimberly Koury, VP Contact Center Operation, (Electric Insurance Company) and Brandon Whiting, Manager, Call Center Operations and Support, (Salt River Project)

Prior to the installation of its NICE solutions, Electric Insurance Company was looking for ways to improve processes, enhance customer experience, and gain the ability to easily and effectively analyze a significant amount of interactions. Goals were established in four strategic areas: productivity, quality, customer retention, and compliance. To achieve these goals, Electric Insurance chose NICE SmartCenter solutions for Recording, Quality Management, Workforce Management, and Interaction Analytics. This session will explore how these solutions enabled Electric Insurance to make dramatic and measurable improvements in all four areas.

Salt River Project (SRP) provides electricity to nearly 934,000 customers in the Phoenix area, and delivers close to one million acre-feet of water annually to a service area in central Arizona. In this session, SRP will share how choosing NICE's solutions for recording, QM, and Interaction analytics, WFM, and customer feedback to capture and optimize its Customer Dynamics has led to improvements in the areas of forecasting and scheduling accuracy, agent training, and overall customer satisfaction.

NICE CUSTOMER EXCELLENCE AWARD RECIPIENTS:

Julie Cole and Janet Pawlowski, Business Analysts, Speech Analytics, (American Airlines)

American Airlines and American Eagle serve 250 cities in 40 countries with, on average, more than 3400 flights daily. With the goals of enhancing customer experience and increasing revenue in mind, American Airlines looked to NICE's professional services team to maximize the impact of their implementation of SmartCenter solutions for recording, QM, Interaction Analytics, and WFM. American Airlines is now seeing better customer experience, increased revenue, and the ability to spot trends in customer needs. Don't miss this dynamic session!

NICE CUSTOMER EXCELLENCE AWARD RECIPIENTS:

Rae Ann Gonzales, Manager, Workforce Management, (GoDaddy) and Les Turner, NICE/IEX Systems Administrator, (Portland General Electric)

GoDaddy is the world's largest domain name registrar and the flagship company of The GoDaddy Group, Inc. GoDaddy realized it needed a robust, automated way to drive operational improvements by increasing agent efficiency and effectiveness and reducing the number of unprofitable calls. Attend this session to learn how GoDaddy went from manual, human-based methods for capturing call categories, to a more sophisticated, analytics-based system that created valuable business intelligence, drove operational efficiency, while vastly improving quality of service.

Portland General Electric (PGE) serves more than 818,000 residential, commercial and industrial customers in Oregon. Prior to its NICE SmartCenter installation, PGE was looking for a way to kick-start its Quality Monitoring program in a way that integrated with its VoIP upgrade. PGE's decision to proceed with an integrated NICE/Cisco solution for recording, QM, Interaction Analytics and WFM has streamlined PGE's processes for evaluation and coaching, provided meaningful insight into customer intent, and created best practices for problem resolution. In this session, PGE will share practical lessons for upgrading and overhauling a busy contact center.

NICE CUSTOMER EXCELLENCE AWARD RECIPIENTS:

David Rame, Vice President (Allconnect, Inc.) and Lisa Brewer, Resource Planning Manager (Cigna)

Like many customers, Allconnect purchased IEX WFM for their 500 agents after using a different WFM system, but did not initially address the fundamentals of optimal schedule generation and performance management. When the Finance, Planning and Analysis group took responsibility for workforce management, things began to change. Analysis was completed to understand the cost/benefits of more flexible scheduling and conformance/adherence reporting. Work processes were changed and agents were engaged in the schedule generation process to ensure an appropriate balance of agent utilization and agent satisfaction. The end result was significant improvement in Revenue per Call and Contribution Margin per Call. Attend this session to hear how Allconnect accomplished the transformation.

CIGNA manages a workforce of 1700 agents across nine contact centers. Using the IEX WFM system to support operational changes, Cigna became the first organization in the healthcare industry to offer 24x7 coverage for their



customers. To accomplish this, Cigna had to expand its forecasting and scheduling to deliver accurate and consistent interval results, without major impacts to the bottom line. CIGNA relied on support from the IEX Training & Consulting group to map out the changes required. Participate in this session to hear how CIGNA was able to use WFM practices to increase customer satisfaction.

NICE CUSTOMER EXCELLENCE AWARD RECIPIENTS:

Alexander Wareham, Event Manager and Vicki Banner, Traffic and Scheduling Analyst/Customer Operations (Fiserv) and Carolina Borges Mendes, Workforce Management Specialist (Contax)

How many hours would you spend managing overtime and undertime requests for 1000 agents across six sites? IEX WFM customer Fiserv found that they were spending an extraordinary amount of time managing a paper based process to manage OT/UT. So they looked for a smarter way to accomplish the task. They found their solution in WebStation. They also discovered that they could save money by placing optimal schedules in the appropriate site based on differences in shift differentials. Attend this session to see how Fiserv continues to find ways to improve the bottom line.

Are you managing multiple sites, each with its own perspective of “proper” WFM methods and procedures? Do you sometimes feel you spend more time explaining differences that cause inefficiencies and lack of effectiveness, rather than correcting the differences? Imagine the challenges you’d have with 29 contact centers, 68,000 agents, 3,400 supervisors, and 800 analysts across multiple lines of business. Attend this session to hear how Contax addressed these challenges by focusing on the administrative functions, management practices, and work processes to align everyone to a common set of objectives.

NICE CUSTOMER EXCELLENCE AWARD RECIPIENTS:

Adam Cincoski, Director, Workforce Management and Randall Sellnow, Associate Director, Workforce Management (Optum Health) and Niles Bess, Director of Workforce Management (Career Education Corporation)

Have you found ways to reduce your ASA by 55%, increase your Service Level by 12%, or reduce your abandons by 45%? That’s exactly what OptumHealth did when they moved their organization with 2000 agents across 20 sites from Schedule

Bidding to Automatic Agent Assignment. The change also enabled better and smarter use of Future Exceptions, Meeting Scheduler, Schedule Optimizer, Block Scheduling, WebStation Trades and WebStation Time Off Manager. OptumHealth relied on the IEX Training & Consulting group to complete a best practices audit and deliver training on using the new scheduling concepts and tools. The end results speak for themselves.

Attempting to accomplish WFM processes using Microsoft Access and Excel is problematic at best and nearly impossible when you grow to 1200 agents. And when you have a non-traditional contact center where the phone time is scheduled as exceptions to a base schedule code of follow up time, the challenges multiply. Attend this session to learn how Career Education Corporation dramatically reduced the schedule production time while increasing occupancy, lowering abandons, and reducing overtime.

OUTBOUND CALLING AND IEX WFM: CUNA MUTUAL GROUP CASE STUDY

Paul Newquist, Intraday Analyst (CUNA Mutual Group)

Do you have outbound work in your contact center that would benefit from workforce management processes and procedures? Do you see the opportunity to improve your bottom line by more effective management of your employees and resources? Attend this session to see how the CUNA Mutual Group has delivered a more automated and disciplined approach to managing staff in a contact center with outbound contacts.

CALIBRATION DONE RIGHT

Tracey Huff, Contact Center Technology Manager (AAA South)

Calibration - this ultra important process is sometimes overlooked. Join this session to learn how it’s done at AAA South, what tools and methods are in use and what benefits it yields.

ENSURING YOUR QUALITY PROGRAM DRIVES BUSINESS RESULTS

Beth Casebolt, Service Excellence Leader (JPMC) and Charlene Gillam, Principal Consultant (NICE)

A well structured quality program drives business results through agent performance. See how JPMorgan-Chase makes sure their quality and business goals are aligned and work together to achieve outstanding results.



PERFORMANCE-BASED QUALITY PROGRAM CREATES A “WIN-WIN-WIN” SITUATION FOR CUSTOMERS, AGENTS AND THE BUSINESS

Danny Bradley, Quality Process Advisor (Whirlpool)

We all know that happy agents result in happy customers and happy shareholders, but reaching this end goal is not always easy. Attend this session and hear how Whirlpool's new performance-based quality process resulted in reduced customer escalations and agent attrition, increased quality scores and customer compliments all while bringing employee engagement to a new level. When you align your quality process with the Voice of the Customer AND your corporate goals, everybody wins!

IMPROVING FIRST CALL RESOLUTION WITH DESKTOP AND SPEECH ANALYTICS

Anja Dingman, Business Improvement Specialist (Sallie Mae) and Peter Thompson, Solution Delivery Specialist (NICE)

First Call Resolution is a very powerful contact center metric, providing visibility into both customer experience as well as contact center performance. See how Sallie Mae leverages a combination of speech analytics and desktop analytics to accurately measure and improve First Call Resolution.

THE TOP 3 WAYS INTERACTION ANALYTICS CAN ENHANCE CONTACT CENTER TRAINING: A CASE STUDY

Laura Nichols, Customer Service Analyst; Call Center Operations and Support, Brandon Whiting; Manager, Call Center Operations and Support (Salt River Project) and Ben Goltz, Practice Manager (NICE)

NICE Interaction Analytics delivers many business benefits. This session focuses on how the solution can be leveraged to improve training in the contact center. Attend this session to learn the three most important ways that this NICE customer used IA to enhance their training process.

INCREASING CUSTOMER RETENTION WHILE IMPROVING OPERATIONAL EFFICIENCY

Kimberly Koury, VP Contact Center Operation (Electric Insurance Company) and Tara Mitchell, Solution Delivery Specialist (NICE)

Increasing Customer retention does not have to come at the cost of Operational Efficiencies. See how NICE users are able to increase customer satisfaction without increasing their costs.

PRODUCTIVITY AND QUALITY – WHO SAYS YOU CAN'T HAVE THEM BOTH?

TBD (Harte Hanks)

The good old tradeoff of call center operations – raise quality, and pay for it with productivity. Well, Harte Hanks are challenging this axiom by combining efficiency and quality data into a single solution. Join to see how they are leveraging CTI and CRM data linked to recorded interactions and integrated with IEX WFM - transfers, call duration, desktop analytics and users' data – all help to pinpoint important interactions for targeted monitoring and quality analysis. Results include huge benefits in productivity (of both reps and evaluators), FCR and quality of service.

NICE ANALYTICS AND QA - CONCEPTION TO IMPLEMENTATION

Rick Van Beek, Supervisor, Call Center Operations (Portland General Electric) and Kathy Stahler, Solution Delivery Specialist (NICE)

The use of Analytics allows you to have a comprehensive insight into the quality of care that your customers are receiving. This session focuses on how the solution can be utilized to improve quality with or without having an Internal Quality Team within your contact center.

THREE KEYS TO SUCCESSFUL WFM ROI: PEOPLE, PROCESSES, SYSTEMS

Steve Weston, Partner (ValueWise Consulting)

ValueWise Consulting (a NICE Systems partner) was hired by a major health plan services provider to develop, implement, and execute a WFM strategy. The partners at ValueWise have had a longstanding relationship with IEX based on experiences at SITEL, United Health Group, and Convergys. After the health plan services provider purchased IEX WFM, ValueWise assisted IEX with the implementation of the system. ValueWise then introduced, implemented, and executed best practices for Forecasting, Scheduling, and RTA through a change management process called Adoption, Readiness, and Design. As part of the project, ValueWise created WFM job profiles and



descriptions for the command center, as well as assisting with the hiring and training of the employees. Based on the success of the implementation and the demonstrated improvements in performance results, the health plan services provider has engaged ValueWise to implement IEX and the WFM best practices across the entire corporation. Attend this session to see the results the health plan services provider was able to achieve through the use of IEX WFM and a focused approach to managing change in the organization to adopt best practices for WFM.

VOIP AND VIRTUALIZATION: HOW TO TRANSITION AND TRANSFORM WFM- PEOPLE, PROCESSES AND SYSTEMS

Mark Butler, Director of Customer Service (Liberty Mutual)

In 2009, Safeco and Liberty Mutual merged companies and began a migration to VOIP which enabled greater virtualization of their contact centers. The migration process involved:

- The installation of a new WFM server in the Liberty Mutual data center as a backup to the existing Safeco WFM Production server, with a plan to reverse the roles of the servers in 2010.
- Collapsing approximately eight individual Avaya data feeds to one centralized feed supporting eight sites, on a rolling migration using SmartSync Import Agent to re-associate agents to the centralized Avaya ACD ID, as well as adjusting logon IDs and skills assignments.
- New WFM methods and procedures to manage true virtual queues to gain the efficiency of the new economies of scale.

Attend this session to hear some of the key learnings from this major migration project

ARE THERE INDUSTRY STANDARDS IN WFM? AND THE SURVEY SAYS...

Vicki Herrell, Executive Director (SWPP)

Each quarter, the Society of Workforce Planning Professionals (SWPP) surveys the workforce planning community on critical workforce planning topics. Attend this session with the founder of SWPP to hear the results of some of the most interesting surveys from the past eight years. Survey topics have included Definition & Measurement of Speed of Answer Goals, Employee Satisfaction with WFM Processes, Utilization

of Remote Agents, Setup of Your Workforce Management Team, Workforce Management Team Measurement, and Job Roles & Backgrounds of WFM Professionals. Come to this session and see if there is such a thing as an industry standard in WFM.

AN INSIDER'S VIEW TO OUTSOURCING

Dan Bower, Director Resource Planning (ACS)

Do you use outsourcers as part of your contact center staffing strategy? Do you sometimes wonder if your SLAs, contracts, penalties, and work processes are working to your advantage? Do you have a specific challenge related to using outsourced agents consistently and effectively? Attend this session to hear from an individual who is well seasoned in the world of outsourcing, having worked with a company who relied heavily on outsourced agents, and who now works for Affiliated Computer Services, an outsource provider.

THE PERFECT STORM... NEW SOFTWARE, TEAM & PROCESSES

Rick Seeley, Senior Manager, RPM (Convergys)

How do you create the perfect workforce management team? What WFM processes do you need to be successful? What does a well constructed WFM team member job description look like? Where are the best sources to recruit new team members? Join Convergys as they lead this session to discuss the dos and don'ts of building a successful workforce team and the processes you need to insure all participants benefit. We will discuss topics relevant to operations and agents, the workforce team, and your upper management and stockholders.

TELLING THE STORY: THE VISUAL DEPICTION OF WORKFORCE PLANNING DATA AND IMPLEMENTING GUIDED ANALYTICS

Jon Johnson, National Command Center Director (GM OnStar)

One of the big challenges encountered by the workforce planning team is telling the story. The most fundamental question of "Are we staffed appropriately?" can be difficult. Even with the use of clever summarization, conditional formatting, and the like, management is often frustrated by not being able to quickly and easily get to the most important, central truth about the staffing situation. Plus, the workforce planning team can spend an inordinate amount of time formatting, summarizing, and re-spinning the data to meet the



constantly changing needs of the various stakeholders who must act upon the workforce planning data. In this session, OnStar will discuss the many dimensions that are required to adequately describe the staffing picture. They will discuss the concept of scarcity and how it impacts management actions. Finally, they will look at some of the solutions that have been used by the workforce planning teams to tell the story using IEX WFM as a data-source. These solutions range from simple, summarized data tables and two-dimensional charts/graphs, to multi-dimensional visuals and dashboards, to guided analytics.

FROM OBSCURITY TO FAME: THE ART OF CONTACT CENTER EFFICIENCY

Greg Gardner, Intermediate Business Analyst
(Manulife Financial)

This session takes you inside Manulife Financial's journey to Contact Center Efficiency and Effectiveness. See firsthand how Canada's largest insurance company turned Metrics Obscurity into Contact Center Efficiency and Effectiveness with the implementation of state of the art tools. Manulife's journey began with Excel spreadsheets and manual cut and paste metrics reporting. Today, forecasts, schedules, key performance indicators, trending, and reporting are all done automatically. Through their Know the Interval strategy, they are achieving remarkable results. Tools which will be discussed in detail include:

- IEX WFM Real Time Adherence
- IEX WFM Supervisor & Agent WebStation
- IEX WFM Vacation Planner
- IEX Performance Manager

PUTTING IT ALL TOGETHER: TANGIBLE BENEFITS OF NICE INTERACTION ANALYTICS + FEEDBACK + IEX WFM AS AN INTEGRATED SOLUTION

Suzanne Rapier, VP of Customer Care (Liberty Mutual)

Quality Management, Interaction Analytics and Workforce Management are three disciplines that have a lot in common. Aligning and integrating the respective processes can significantly improve contact center performance and business results - such is the case of Liberty Mutual. See how the company integrates QM and WFM processes so as to have business decisions based on integrated analysis from the contact center and the back office, and consequently improving the overall customer experience.

COMMON CONTACT CENTER CHALLENGES AND NICE WAYS TO SOLVE THEM

Jackie Knez, Director - Consulting (NICE)

There is certainly no shortage of challenges in running a contact center. This session shows how NICE solutions can help your contact center overcome several common challenges, along with some new ones that are emerging.

ENTERPRISE DEPLOYMENT: BEST PRACTICE PROCESSES FOR HOW TO DO IT RIGHT

Victoria Monica, Principal Consultant (NICE)

Running a successful enterprise-scale deployment is a huge undertaking, but there are ways to make it easier even in the most challenging organizations. This session examines the key issues from a business perspective and suggests guidelines and tips drawn from rich experience of large scale projects. Good change management processes, setting up centralized administration and the use of consulting services make a difference in the success of your initial deployment and on-going contact center processes.

CASE STUDY – DEPLOYING ALL AT ONCE: VOIP, QM, WFM AND ANALYTICS

Les Turner, NICE/IEX Systems Administrator (Portland General Electric) and Kelly Sanders (NICE)

This session presents a case study in a multi-solution deployment involving WFM, QA, Analytics and VoIP at Portland General Electric. Learn what challenges they encountered, how they were overcome and the operational benefits being enjoyed today.

QUALITY PROGRAM MODEL THAT WORKS FOR PERFORMANCE FEEDBACK THAT MATTERS

Penny Tootle, Customer Services Supervisor, (Las Vegas Valley Water)

Las Vegas Valley Water District, who has been using NICE solutions for over 4 years, recently began an initiative to fully leverage the applications for a more comprehensive and meaningful performance assessment program. Their technical call center environment enabled them to capitalize on integration and build better communication venues with the help of My Universe and IEX WFM Agent WebStation. See how NICE SmartCenter helped them to facilitate a change in culture and drive agent accountability.



IEX WFM RELEASE 4.2 UPGRADE: TECHNICAL DECISIONS

Joe Day, Senior Manager, Special Projects (IEX)

This upgrade will be a bit different than past upgrades, so we want to help you plan for a successful upgrade process. Join this session to discuss database options, hardware minimum requirements for the server and workstations, distributed architecture choices, ACD interface requirements, and other technical considerations

Note: There are three opportunities to attend this session—one Pre-Conference Workshop and two breakout sessions.

IEX WFM RELEASE 4.2 UPGRADE: IMPLEMENTATION AND SUPPORT

Randy Price, Vice President, Customer Care, Mike Darby, Sr. Manager, Customer Support, Todd Ramsey, Manager Implementation and Rebecca Brady, Manager Implementation (NICE)

This session will answer your implementation and support questions: Are you wondering how to get in the project queue for a PUSC? Are you wondering what the PUSC is and why you need one? How will your Customer Advocate support you through the upgrade process? How will you get an IEX Project Manager assigned to help you with the upgrade? Should you upgrade a test server first? How can you schedule training for your staff? What training is available? How will 4.2 and 3.12 be supported as the IEX customer base goes through upgrades over the next several months? Who will you contact for support?

Note: There are three opportunities to attend this session—one Pre-Conference Workshop and two breakout sessions.

IEX WFM RELEASE 4.2 UPGRADE: PRE- AND POST-UPGRADE ACTIVITIES

Jeffrey Rogerson, Lead Business Solutions Specialist (NICE)

You're heard about all the great new features and functionality in Release 4.2, but how do you prepare your existing database for a successful conversion? In this session we will focus on the things you need to do to prepare your database - and your users - for the upgrade. We'll take a detailed walkthrough of:

- Training and education opportunities
- Pre-upgrade activities checklist
- Post-upgrade activities checklist

Note: There are three opportunities to attend this session—one Pre-Conference Workshop and two breakout sessions.

IEX WFM RELEASE 4.2 ODBC AND SMARTSYNC - WHAT'S DIFFERENT?

Meghan Barni, Business Systems Analyst (NICE)

Among the tasks associated with the upgrade to release 4.2 is assessing the impact to your custom reports and database queries that use ODBC. If you use SmartSync, your investment will pay off with the upgrade, since the SmartSync interface has only minor changes. Attend this session to review the changes in ODBC and SmartSync so that you can prioritize your preparation efforts for the upgrade.

UNDER THE HOOD- INTERACTION ANALYTICS

Hila Lam, Product Manager Interaction Business Applications (NICE)

Although the end result appears as magic, when you look under the hood you find that Interaction analytics is a combination of advanced speech, voice and text engines run by a set of sophisticated algorithms. In this session you'll discover the cutting edge technology that drives value for contact centers and organizations - from phonetics indexing, text mining and emotion detection to root cause analysis.

Note: There are two opportunities to attend this session.

EMPOWERING IT TO MAXIMIZE VALUE TO BUSINESS USERS WITH INTERACTION ANALYTICS

Beeri Mart, Product Manager; Market Management-CCE, QM Applications (NICE)

Some of the most successful implementations of NICE reach beyond the traditional recording and QM systems, to other Information Technologies such as CRM, Business Intelligence, Campaign Management, Sales Applications and more. Join this session to learn about the technical aspects of integrating Interaction Analytics insights with other systems so that your organization can make the most of the NICE solutions.



ALWAYS-ON RECORDING: PLANNING FOR HIGH AVAILABILITY AND BUSINESS CONTINUITY

Ziv Grinberg, Product Manager; PM Infrastructure (NICE) and Fred Walker, Global ISV Alliances Director; Archiving Division (EMC)

If the NICE Solution is considered mission-critical to your business, ensuring its continued availability is crucial. This session takes a detailed look at the available options for developing a business continuity strategy for the solution. Topics to be covered include recording redundancy, server resiliency and clustering, disaster recovery and more.

SIP IS HERE - IP CALL RECORDING WITH SESSION BORDER CONTROLLERS

JIm Donovan, VP Enterprise Product Management (Acme Packet) and Uri Frieder, Product Manager; PM Infrastructure (NICE)

Session Initiation Protocol (SIP) is an emerging industry standard for IP-based communications. It provides companies significant benefits including simplified network administration and cost-savings by eliminating redundant network infrastructure. Attend this session to learn about recording in SIP trunk environments and the benefits it provides to enterprises.

RECORDING IN AVAYA ENVIRONMENTS – SUPPORTING YOUR AVAYA AURA ROADMAP

Uri Frieder, Product Manager; PM Infrastructure (NICE) and Donna M. Holt, Applications Sales Executive (Avaya)

Avaya Aura™ is the evolution of Avaya's open, reliable, and extensible IP communications platform. In this session, we will discuss how your organization can benefit from the most advanced recording solutions for existing and planned Avaya Aura environments, and how NICE can smoothly support the migration of organizations from a Nortel environment to Avaya's new solutions.

RECORDING IN CISCO ENVIRONMENTS - CURRENT SOLUTIONS AND A SNEAK- PEEK INTO THE FUTURE

Uri Frieder, Product Manager; PM Infrastructure (NICE) and Ken Rahor, CCBU Product Manager, Marketing (Cisco)

Developer partners' since 2000, NICE's IP solutions are fully integrated with Cisco's Unified Communication System (UCS), and are aligned with Cisco's strategy for unified

communication, offering Interoperability with Cisco Unified Communication Manager and Unified contact Center (IPCC) environments. Together, NICE and Cisco offer ongoing synergies, including a range of solutions designed to meet all multimedia recording, quality management and interaction analytics needs. Join us to hear more.

VIRTUALIZATION – WHERE ARE WE HEADING?

Jeff Margolese, Sales Manager (VMware) and Eran Shiff, Director of Product Management (NICE)

With economic pressures affecting contact centers disproportionately, server consolidation is no longer exotic or difficult to accomplish; rather, it's a cost-saving necessity that is straightforward to perform, with virtualization. Virtualization of servers is the most efficient way to consolidate many physical servers on to one server, and then manage the multiple virtual servers on the remaining machine. Join us in this session to learn more about NICE's offering and where we are heading.

EMC & NICE BEST PRACTICES: REDUCE BUSINESS RISK & IMPROVE CALL CENTER OPERATIONS BY OPTIMIZING YOUR STORAGE INFRASTRUCTURE

Fred Walker, Global ISV Alliances Director; Archiving Division (EMC), Eran Shiff, Director of Product Management (NICE)

The Storage industry is one of the most innovative IT industry solutions. Resiliency, virtualization, compliance and cost reduction are some of the challenges which are best addressed using NICE Storage Center. Join this session to learn more about our latest and greatest in the field.

TDM & IP - THE END OF THE BEGINNING AND THE TRANSITION PHASE

Asaf Shalom, Product Manager; PM Infrastructure (NICE)

VoIP telephony brings many opportunities to improve the performance and maintainability of your recording infrastructure, but good planning is important to make the transition a smooth one. This session provides a technical view into the basics of VoIP recording along with the different recording strategies and their relative pros and cons. Specific considerations for the main VoIP telephony vendors will also be presented.



UPGRADING – HOW TO MAKE IT SMOOTH AND EASY

Erez Ardoni, Director, Product Management; PM Infrastructure (NICE)

NICE's solutions have evolved significantly over the years, from 8.x systems to the current NICE Perform solutions, while remaining at the forefront of technology. This session presents the key benefits gained from upgrading to NICE Perform and addresses the essential questions and concerns – What are the upgrade paths to NICE Perform? How does NICE enable investment protection? How do you ensure easy data migration and minimize system downtime?

ANYWAY YOU WANT IT - NEW OPPORTUNITIES FOR INSIGHTS FROM INTERACTIONS WITH MULTI CHANNELS

David Geffen, Product Marketing Manager (NICE) and Jon Morrow, Senior Program Manager (Microsoft)

NICE introduces the ability to capture interactions from a multiple variety of channels including mobile phones, email and IM. Join us in this session to learn more what this means for you and your business.

BRANCH RECORDING - IT'S EASY

David Geffen, Product Marketing Manager (NICE) and TBD (Wilmac)

Branches are an increasingly utilized channel for customer interactions. The growing importance of branches and increasing regulatory requirements are driving an increased need to record interactions with customers at the branch. Meet NICE Perform eXpress - NICE's recording and quality management solution for enterprises with branch environments. Join this session to learn how NICE Perform eXpress can address your needs.

IEX WFM HARDWARE CONFIGURATIONS

Michael Borts, Project Manager, Hal Kenyon, Project Manager and Joe Day, Senior Manager, Special Projects (NICE)

Gaining the most value from your WFM investment includes more than just knowing how to use the application. You also need to ensure the hardware platform is healthy for the long term. Since we know that the only constant in the contact

center is change and some changes can impact the WFM hardware, how do you ensure your hardware investment is paying off? Attend this session to discuss the reasons for and process of hardware upgrades, application upgrades, server security, server redundancy, and server sizing and replacement.

IEX WFM DATABASE MIGRATIONS

Derek Leonard, Implementation Engineer (NICE)

In today's changing world, companies' infrastructures can change frequently. How can IEX WFM adapt to those changes? Attend this session to learn how to leverage the power of SmartSync to consolidate two or more servers into one; to move individual sites between Customer ID partitions; or to partition a single database into multiple Customer IDs or servers. Our methods allow you to easily migrate contact history, agent definitions, schedules, and other data from one database to another without straining your data-entry resources. Learn which data can be transferred, initial setup requirements, timelines, and costs.

IEX WFM SMARTSYNC IMPLEMENTATIONS

Dan McCarty, Project Manager and Melissa Hartley, Project Manager (NICE)

This session provides an overview of SmartSync imports and exports and implementation processes. We will help you determine what imports or exports you need, the setup and implementation requirements, the Statement of Work process, and special consideration for the deployment of SmartSync Exchange.

IEX WFM RELEASE 4.2 UPGRADE: TECHNICAL DECISIONS

Joe Day, Senior Manager, Special Projects (NICE)

This upgrade will be a bit different than past upgrades, so we want to help you plan for a successful upgrade process. Join this session to discuss database options, hardware minimum requirements for the server and workstations, distributed architecture choices, ACD interface requirements, and other technical considerations.

Note: This session is also presented in a Pre-Conference Workshop



IEX WFM FORECAST ALGORITHMS

Rachael Smith, Business Solutions Specialist (NICE)

Peel back the IEX WFM forecast algorithm and see how the use of historical data can predict the future by using trends, seasonality, week-of-month and other distribution patterns. We will also look at the concepts of common cause and special cause drivers of the forecast, as well as the tools used to identify what is really driving your contact volumes.

Note: This session is also offered as a Pre-Conference Workshop.

IEX WFM SCHEDULE GENERATION: UNDERSTANDING AND WORKING WITH IT

Rachael Smith, Business Solutions Specialist (NICE)

Does it feel like your scheduling processes have gotten a bit stale? Do you find you do more and more manual work with each schedule run? Attend this session to gain a better understanding of the scheduling options available in IEX WFM and how to put them to work for you. You will leave this session knowing how the scheduler works to cover requirements, different settings that can be used to influence the schedule generation, and schedule generation insights.

IEX WFM REPORTS: GETTING STARTED ON PERFORMANCE MANAGEMENT

Rachael Smith, Business Solutions Specialist (NICE)

This session is a review of several reports in IEX WFM that are used to report and analyze data. Participants will gain a basic understanding of the intended use of these reports. Some of the reports that will be reviewed include: Time Utilization; Adherence; Conformance; Agent Detail; CT and MU Analysis; Queue Utilization; CT & MU Measurements; CT & MU Results. We'll also give you a snapshot of how this basic information is used in IEX Performance Manager to enhance the performance management process.

CARING FOR THE CUSTOMER: IEX CUSTOMER ADVOCATES AND WFM/PM SELF-HELP

Mark Lampe, Customer Advocate; Professional Services (NICE)

The Customer Advocate is your front door to the NICE IEX organization. Attend this session to learn how to take full advantage of the Customer Advocate services available to you. You will also take a tour of the various self-help and research

options available to you, including the new NICE User Group Community site which now hosts the IEX WFM/PM User Forums.

WORKFORCE MANAGEMENT FUNDAMENTALS

Brandi Malatesta, Business Solutions Specialist and Caroline Giresi, Business Solutions Specialist (NICE)

The first step into a workforce management command and control center can feel like you have entered a never ending stream of abbreviations, acronyms and shorthand. This session is ideal for those who have just entered workforce management or the contact center and need the 411 on one of the enterprise's most crucial departments. Learn about basic WFM concepts and explore fundamental processes related to the science and art of resource planning.

Note: This session is also offered as a Pre-Conference Workshop.

IEX WFM SCHEDULE PREFERENCES IN THE REAL WORLD

Caroline Giresi, Business Solutions Specialist (NICE)

Attend this session to discover how schedule preferences can work for you and dispel the myths surrounding this time saving feature. See ways agent preferences can be used as a fairness tool, a logical order tool, and much more. We will discuss how to use agent preferences to accommodate your environment using either Automatic Agent Assignment or Automatic Pattern Assignment (or both!).

IEX WFM SCHEDULE BIDDING: MORE THAN YOU THINK

Brandi Malatesta, Business Solutions Specialist (NICE)

Schedule Bidding can do so much more for you than just generating infrequent schedule bids for fixed schedules. What-if scenarios, at-home scheduling, and creating schedules for new hire classes can all be accomplished with this flexible feature. Discussion will include Automatic Pattern Assignment and use of the Schedule Bidding feature in Agent WebStation. Join us in this session to see how much the Schedule Bidding features can contribute to your scheduling world.



IEX WFM SHORT CUTS & JOB AIDS

Ashlie Graham, Business Solutions Specialist (NICE)

Whether you are new to IEX WFM or a seasoned veteran, here's a chance to see a quick lesson on quick keys, screen navigation, report generation, and general information gathering short cuts and job aids.

Note: There are two opportunities to attend this session.

IEX WFM CHANGE MANAGEMENT FUNDAMENTALS

Greg Budde, Business Solutions Specialist (NICE)

This session will introduce you to several tools in IEX WFM that are used to monitor changes and make changes. Participants will gain a basic understanding of the intended use of these reports. Some of the screens that will be reviewed include: Skill Plan Monitor; CT, BU and Multi-CT Intraday; MU, CT and BU Agent State Summary; Real Time Adherence; Performance Analysis; Individual Schedules; Schedule Management; Audit Trail; Trade Schedules; Move Agent; Meeting Scheduler; and Schedule Optimizer.

Note: There are three opportunities to attend this session—one Pre-Conference Workshop and two breakout sessions.

NICE RECORDING AND QM - QUERY TIPS AND TRICKS

Eric Gantwerk, Senior Education Specialist (NICE)

Learn how to make your Business Analyzer queries more powerful, whether you are searching for Interactions, Evaluations, Audit Trail activity or Packages. Your NICE expert will walk you through best practices in 3.2 whether you are creating Public or Private Queries. Also see how you can effectively utilize Saved Items folders for future reference.

IEX WFM 4.2 FOR STAFF PLAN & WEEKLY PLAN USERS - WHAT'S DIFFERENT?

Linda Tracy, Business Solutions Specialist (NICE)

If you currently use Staff Plan or Weekly Plan in IEX WFM 3.x, you need to attend this session. Staff Plan and Weekly Plan customers will experience several changes with the upgrade to IEX WFM 4.2. Join us as we highlight new concepts, changes to the database structure, important data conversion information, and new user tasks. These changes will result in different approaches to forecast generation and managing schedule information.

COACHING PACKAGES & MYUNIVERSE FOR AGENTS: TIPS AND TRICKS TO HELP YOUR AGENTS HELP THEMSELVES

Jessica Steele, Supervisor Quality Assurance (Sallie Mae) and Eric Gantwerk, Senior Education Specialist (NICE)

Discover some of the most useful (and simple) customizations you can make to the MyUniverse portal to enhance its value for your agents. Learn how to set up views and preferences that enable them to easily view the information most relevant to their performance.

ADD, MOVE AND DELETE IN NICE RECORDING & QM

Dennis Walsh, Technical Trainer (NICE)

If you have administration responsibility for NICE Recording & QM, this session is specifically designed for you! The session will cover day-to-day system administration tasks such as adding agents, users, assigning the right security privileges, moving system resources such as phones, etc. NICE's expert will explain how to optimize your administration efforts and make your life easier.

IEX WFM 4.2 ON-DEMAND LEARNING LAB

Do you want to learn more about NICE IEX WFM 4.2? Stop by the Learning Lab and use our self-paced on-demand webinar series to teach yourself on topics that interest you. You will lead yourself through one or more of the following modules:

- Database Modules (Part 1)
- Database Modules (Part 2)
- Database Modules (Part 3)
- Database Modules (Part 4)
- Navigation Module
- Process Module (Part 1 Forecasting)
- Process Module (Part 2 Scheduling)
- Process Module (Part 3 Change Management)
- Process Module (Part 4 Report Manager)
- WebStation Module (Part 1 WebStation Administration)
- WebStation Module (Part 2 Supervisor WebStation)
- Time Off Manager Module (Part 1 TOM Administration)
- Time Off Manager Module (Part 2 TOM Supervisor WebStation)
- WebStation Plus eTrainer Modules
 - ScheduleViewer
 - StatsViewer
 - Schedule Trading
 - Schedule Bidding
 - Schedule Changes
 - Time Off Manager
 - Schedule Preferences
- Managing Change eTrainer Module

Note: Much of the information in these modules was covered in the Pre-conference Training titled "IEX WFM 4.2: WIIFM". The Learning Lab is a self-paced learning environment; you do not have to complete all the modules – choose the modules that interest you. Space is limited and seats will be taken and then released throughout the breakout session times, so check back if no seats are available.



OPEN FORUM: FORECASTING AND PLANNING PRACTICES

Facilitated by Linda Potter, Contact Center Technology Manager (AAA South)

Join your peers in this session to share successes and challenges with the art and science of forecasting and planning. Bring your real world experiences and expertise and leave with new perspectives. We will have NICE Interaction Analytics expert available to answer your questions about how IA can augment your forecasting processes.

Note: There are two opportunities to attend this session.

OPEN FORUM: SCHEDULE GENERATION PRACTICES

Facilitated by Anne Healy, Senior Scheduler, Workforce Management (LLBean)

Finding the right balance between agent satisfaction and covering ever-changing staff requirements can be a challenge. Fixed or flexible schedules; static or variable shifts—how can IEX WFM support all the nuances of your complex scheduling world? Come to this open forum to network and discuss the tips, tricks and traps of schedule generation.

Note: There are two opportunities to attend this session.

OPEN FORUM: IEX WFM CHANGE MANAGEMENT PRACTICES

Facilitated by Jon Johnson, National Command Center Director (GM OnStar)

Intraday management sometimes gets compared to NASCAR racing-pedal to the metal and adapt as it happens. Come prepared with your questions, answers, and tune-up tips on how to manage to the moment of ever changing plans and priorities.

Note: There are two opportunities to attend this session.

OPEN FORUM: IEX WFM WEBSTATION APPLICATIONS

Facilitated by Michael Heihn (State Farm) and Brad Anderson (Convergys)

The IEX WFM WebStation suite of products provides a wealth of functionality and provides many topics for discussion: deployment practices; features and functionality; and best practices for getting the most from your investment. Come prepared to share what you have learned or ask questions of those who have put more of the WFM process in the hands of the agents and supervisors.

OPEN FORUM: MANAGING THE WORKFORCE MANAGERS

Facilitated by Randall Sellnow, Director of Workforce Management-Care Solutions (Optum Health)

Wondering about staffing your workforce management group? Do you have individually assigned and clearly defined duties, schedules, and workloads...or do you share the pain? How is the WFM staff's job performance measured in your center? What is the right number of WFM analysts? No right or wrong answers here, but come to this session to share what you do and pick up ideas to energize your workforce team.

OPEN FORUM: HOW DO YOU HANDLE THIS WFM CHALLENGE?

Facilitator: Tom Graves, Director, Customer Service (Carolina Biological Supply Company)

Do you have operational questions you just can't get to the bottom of? Are challenges making you feel all alone out there? Join this session where anything WFM goes! In this fast paced, highly interactive session you will have the opportunity to submit your hottest WFM challenge, then listen as your peers offer thoughts, opinions and suggestions about how to handle the challenge.

OPEN FORUM: WFM AND PM OUTSIDE THE INBOUND CALL CENTER

Facilitated by Kimberly Hopewell, Manager Intraday Workforce Management, and Paul Newquist, Intraday Analyst (CUNA Mutual Group)

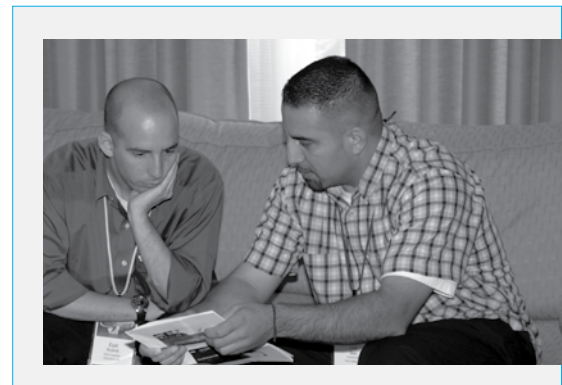
Past success fuels innovation. Our customers have demonstrated significant ROI and process improvements in the inbound call center by deploying IEX WFM and Performance Manager - and others in the organization are taking notice. Buzz is occurring around the topic of applying proven WFM and PM principles in the back office, middle office, outbound centers, email departments, and chat support groups. Attend this session to ask your questions or share what you've accomplished in applying WFM and PM disciplines outside the inbound call center. What works? What doesn't work? What technical innovations are needed to solve unique challenges?



OPEN FORUM: MANAGING PERFORMANCE

Facilitated by Shannon Sheumaker, Workforce Management Manager (Nationwide Insurance)

The process of managing performance is unique to each contact center's culture and capabilities – there is no right or wrong way to do it and there are many solutions available to help the process. Attend this session to share ideas, questions, and challenges you face in managing agent performance, supervisor performance, and overall contact center performance. If you currently use one of NICE's solutions that help drive performance, come prepared to share your key learnings and golden nuggets of wisdom



OPEN FORUM: SETTING AND MANAGING TARGETS THAT ARE RIGHT FOR YOU

Shevy Levinstein, Director of Business Integration (NICE)

Contact centers have different approaches and techniques to measure and manage First Contact Resolution (FCR). Join this open discussion to learn about the impact of FCR on customer experience, best practices to set and effectively track FCR objectives, and how the NICE FCR solution can help you meet your FCR targets.



PERFORMANCE REPORTING OR PERFORMANCE MANAGEMENT: WHAT'S THE DIFFERENCE?

Jeff Williams, Director, Product Management and David Lambert, Business Solution Architect (NICE)

Performance Management has many definitions in today's contact center. In its simplest form, performance management is results reporting. And we all know there is no lack of result reports in the contact center. What is needed to redefine result reporting as performance management? We'll answer this question by reviewing the basic performance management capabilities available in TotalView reports and WebStation StatsViewer. Then we'll extend the definition of performance management to managing by objectives by walking you through advanced performance management capabilities available in IEX's Performance Manager solution. Finally, we'll help you differentiate between NICE's various performance management capabilities found in IEX's Performance Manager and NICE's Quality Optimization.

Note: There are three opportunities to attend this session—one Pre-Conference Workshop and two breakout sessions.

IEX WFM 4.2 SUPERVISOR WEBSTATION: THE TOOLKIT EXPANDS

Connie Yount, Business Solutions Specialist (NICE)

Join this session as we highlight the Supervisor WebStation differences in IEX WFM 3.1.2 and IEX WFM 4.2. You will learn how to administer Schedule Trades, Schedule Changes, and Schedule Preferences using Supervisor WebStation. We'll also discuss a new feature called Time Board which allows you to offer time slots to agents to work overtime or take excused time off. In addition, you will see the new TotalView Reports Manager which enables you to view all reports in .pdf, .rtf, .xls, and Crystal Reports Viewer formats.

Note: There are two opportunities to attend this session.

IEX WFM 4.2 TIME OFF MANAGER: NEW AND IMPROVED

Connie Yount, Business Solutions Specialist (NICE)

Attend this session to see the enhanced Vacation Planner module in IEX WFM 4.2. All time off administration and related processes have been moved to WebStation, and are known as Time Off Manager. See the improvements we've made to administer time off requests, such as single accrual, multiple selections.

Note: There are two opportunities to attend this session.

BACK OFFICE WFM/PM & FRONT OFFICE DESKTOP MONITORING

Brenda Hansen, Business Solutions Architect and Paul Leamon, Director, Product Marketing (NICE)

Back office operations are often out of sight, but to corporate management, they are rarely out of mind. For most corporations, back offices handle the communications and fulfillment activities that keep businesses running smoothly and efficiently. Aply managing this vital asset requires building accurate forecasts and schedules that balance workload and staffing resources. In this how-to session, you will learn ways to extend workforce management systems and practices into the back office. Discussion will focus on the similarities and differences between the front and back offices, the impact of the middle office on bottom line results, and ways to overcome data collection obstacles. With this data, IEX WFM builds accurate forecasts and efficient schedules and provides the visibility to manage the performance of your back office employees. In addition to back office workforce management and performance management, you will learn how this new technology can provide visibility into the desktop application usage of your front office agents.

Note: This session is also offered as a Pre-Conference Workshop.

IEX WFM VACATION AND HOLIDAY PLANNER (PART 1)

Dick Bensinger, Business Solutions Specialist (NICE)

Few contact center activities are met with as much interest as vacation or PTO planning. Attend this session to learn how to manage the vacation/PTO process easily and fairly using the Vacation Planner feature. You will see an overview of the features and discuss initial setup considerations. This session also provides an in-depth look at Vacation Planner reporting and the how-to of agent bidding, database management, supervisor overrides, accrual tables, carryover, and other features.

IEX WFM VACATION AND HOLIDAY PLANNER (PART 2)

Dick Bensinger, Business Solutions Specialist (NICE)

Few contact center activities are met with as much interest as vacation or PTO planning. Attend this session to learn how to manage the vacation/PTO process easily and fairly using the Vacation Planner feature. You will see an overview of the



features and discuss initial setup considerations. This session also provides an in-depth look at Vacation Planner reporting and the how-to of agent bidding, database management, supervisor overrides, accrual tables, carryover, and other features.

IEX WFM REAL TIME AND HISTORICAL ADHERENCE

Ashlie Graham, Business Solutions Specialist (NICE)

A perfect forecast and schedule will not be successful if agents aren't where you need them to be. Real-time and historical tracking of your agents' schedule adherence makes your contact center more efficient. Delve into ways this wealth of information can be used without being punitive. Also see an overview of the Adherence and Conformance Reports and discuss how to interpret them.

EMPOWER YOUR ORGANIZATION WITH IEX WFM WEBSTATION (PART 1 &2)

Ryan McGuire, Business Solutions Specialist (NICE)

Empowering your agents and supervisors through the use of self service technology is a win for all. Join this session to see examples of how to improve communication and streamline administrative tasks through the use of IEX WFM WebStation. Examples of schedule preferences, schedule trades, time off requests, and schedule change requests/approvals will be demonstrated and discussed. Learn how to automate these activities and put the power in the hands of the agents and supervisors.

Note: This two part session is also offered as a Pre-Conference Workshop.

INTELLIGENT OUTBOUND LIST & CAMPAIGN MANAGEMENT

Bill Andrews, Product Manager (ALI Solutions)

Join IEX's partner ALI Solutions in this session to explore features to centralize and automate dialer campaign management. Through the use of customer case studies of best-in-class outbound management, the value provided by the following products will be discussed:

- OnQ™- automate and centralize campaign and policy management, ensuring call rule compliance, all while you meet your goals and quotas as staff resources are fluctuating.

- CallTech™- reach more Right Party Contacts when they are available and willing to make a promise-to-pay or purchase.
- ActionSelect for Collections™ - drive optimal account level treatment decisions using action scores, optimization and simulation.

UNDER THE HOOD – THE NICE RECORDING ARCHITECTURE

Dan Hadari, Manager of Systems Architecture (NICE) and Braley Simonton (Covergys)

The NICE Solution architecture is designed to provide the power and flexibility needed to adapt to a wide range of business environments and operational configurations. This session provides a technical view of the different architectural components, their functionality and how they interact to create the NICE Solution.

SYSTEM MONITORING- TAKE CONTROL WITH NICE SENTINEL

Erez Ardoni, Director, Product Management; PM Infrastructure (NICE)

This session presents NICE's new monitoring platform, NICE Sentinel, covering all NICE recording and archiving aspects. In this session we will address issues concerning alarming, monitoring and how can NICE Sentinel assist you in conforming with recording compliance regulations.

