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|  | SuperCommunity Banks Call Center Agenda |
|  | Marriott Long Wharf, Boston, MA  September 18 – 19, 2023  (Casual attire; jeans welcome) |

# [Sunday, September 17th]

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| [5:45 PM] | Meet Anat in the lobby. Anat’s mobile: (916) 717-1710. |
| [6:00 PM] | Optional dinner offsite\*. |

# [Monday, September 18th]

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| [7:30 AM] | Breakfast |
| [8:00 AM] | Roundtable Discussion  • Bring 2-3 good ideas to share with the group  • Bring one best practice  • Discuss an example of what not to do (disasters)  •. Bring questions you’d like to ask |
| [10:00 AM] | Break |
| [10:15 AM] | Call flow, skilled vs. unskilled |
| [11:00 AM] | Cost per call & first call resolution |
| [12:00 PM] | Lunch |
| [1:00 PM] | Reporting & reporting strategy |
| [2:00 PM] | KPI’s & KRIs (and digital stats) |
| [3:30 PM] | Live chat |
| [3:30 PM] | Adjourn |
| [5:45 PM] | Meet in the lobby. |
| [6:00 PM] | Dinner offsite\*. |

# [Wednesday, September 19th]

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| [7:30 AM] | Breakfast: Topics for our next meeting |
| [8:00 AM] | Goals (bring yours) |
| [9:00 AM] | Evolution to a revenue center |
| [10:00 AM] | Break |
| [10:15 AM] | New hire training |
| [11:00 AM] | Policies & procedures – probation period? |
| [12:00 PM] | Lunch |
| [1:00 PM] | Online account onboarding |
| [2:00 PM] | Onboarding of employers |
| [3:00 PM] | Adjourn |

ADDITIONAL TOPICS TO CONSIDER

1. Human Resources - scheduling, recruitment, remote work, training
2. Virtual assistants
3. Managing change
4. Vendor assessment
5. Chat features, success and cost savings
6. Fraud prevention

\*Guests are welcome.

Note: Please bring copies for everyone.