

Bridging the Gap to

WORLD CLASS CUSTOMER SERVICE



Cooney Solutions Group

Client Introduction

SERVICE FIRSTSM

CooneySolutionsGroup.com

210-390-0360

11815 IH-10W, Suite 605 San Antonio, TX 78230

Company Executive Team



- **General Wilson C. “Bill” Cooney**
 - Founder and Chairman of CSG
 - Senior NATO Exec and Former President of USAA
- **Tim Montgomery**
 - Founder and CEO of CSG
 - Customer contact industry expert
- **Paul Reilly**
 - Founder and Board Member of CSG
 - Former CEO of Cenvéo, a multi-billion dollar printing company
- **Philip Hughes, M.D.**
 - Founder and Board Member of CSG
 - Owner of Hughes Dermatology Physicians in San Antonio, TX

CSG's Trio of Solutions



CSG specializes in three arenas critical to success in the service industry.



Quality-Focused Business Process Outsourcing

Providing world-class customer contact support.



Service Partnerships

Agreements with leading edge solution providers for internal support and client sales.



Consulting Services

Recognized experts in service strategy, operational excellence, and culture development.

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Our Outsourcing Approach



- Established and led by call center experts who know how to overcome the industry challenges and missteps.
- Employee-focused, service-first culture led by a team with a proven track record.
- True client partnerships focused on continuous service improvement with expertise in reducing unnecessary calls and rework.
- US-based location in San Antonio, TX.
- Flexible technology allows for customization and is affordable to smaller call centers.
- Scalable model with potential for home based and expanded geographical support

Service Center Goal



Create a Service First contact center culture that facilitates a seamless connection between customer experience and continuous service process improvement.

Driving Principles



- **Culture is the key foundation**
 - We are experts at providing front line coaching and feedback.
 - Our people are the organization’s most valuable assets.

- **“Service-First” model built around the front line agents**
 - A focus on front line agent job and quality of work life satisfaction drives all process decisions.
 - We foster an environment focused on continuous learning and development.
 - Our front line agents have a complete understanding of their customer’s lifestyle and needs.
 - Customer and front-line feedback drive immediate process and product improvements.

Driving Principles



- **Appreciation for Promoters and Distracters**
 - Every contact is viewed as an opportunity to improve future satisfaction via an improvement in the service process.
 - Our clients have the ability to learn from every interaction with a focus on moving the satisfaction bar for all future contacts.

- **The Right Technology for Our Clients**
 - Programs and processes are developed around the specific needs of our clients.
 - Technology makes it easy to connect and support our clients.

Driving Principles



- **A holistic view of Key Performance Indicators**
 - Every department has an ownership stake in the contact center's key performance indicators.
 - We connect the metric's output with the internal drivers.
 - We drive change based on customer-driven metrics.

- **Experts in the execution of the Service First model**
 - Quick, friendly service always wins...period
 - The customer's experience is more important than our cost reduction
 - The entire experience has more value than any single transaction
 - Clients will market us via word of mouth based on experience

New Client Activity Timeline

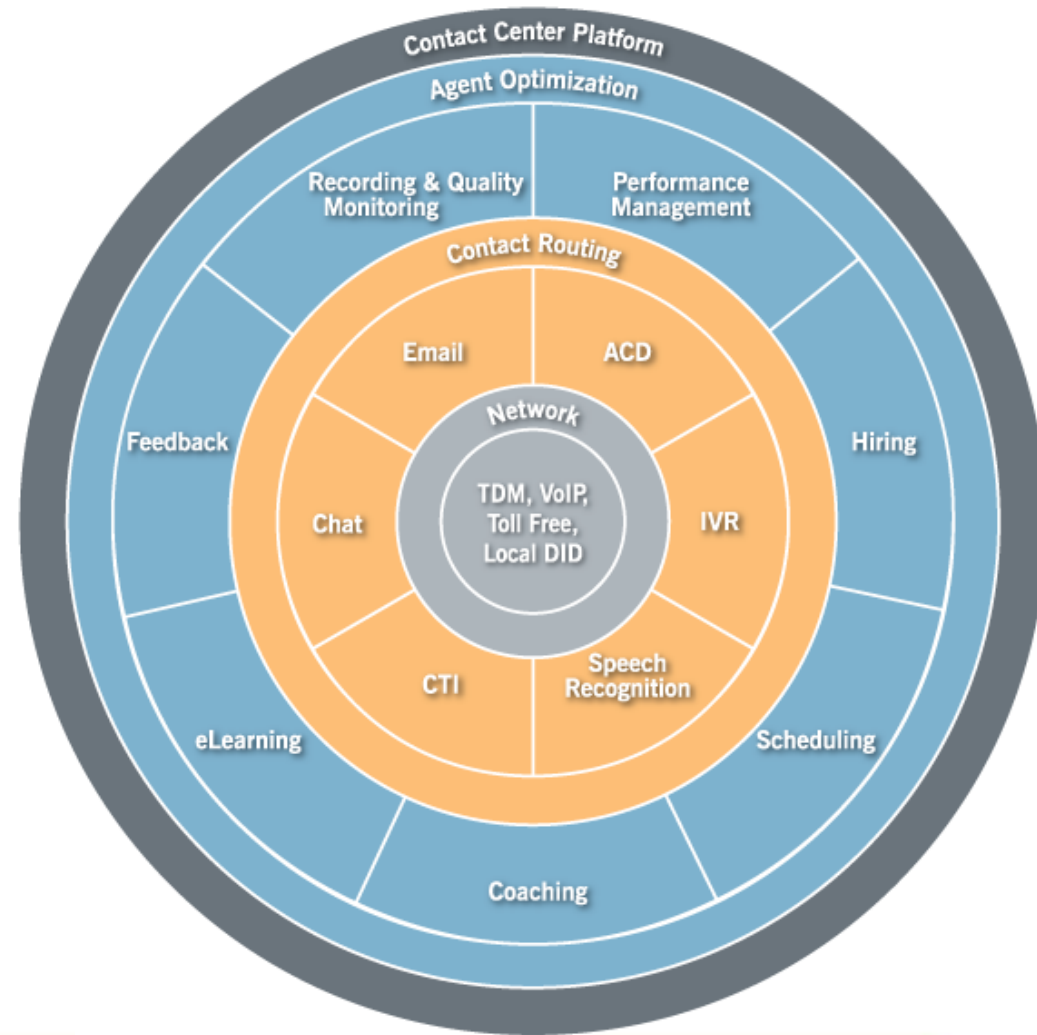


	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Start
HIRING	Update Job Postings. Begin Recruiting Process. Utilize applicants in current pipeline	Applicant Hiring Process - Screen, Background checks, Testing (HR Partner Company)		Agent offer and acceptance (HR Partner Company)		Confirm Class Attendance	Agents in Training Class
TRAINING	Onsite assessment	Work with client to define training transfer requirements		Hand's on for CSG Trainer and Leadership	Incorporate CSG Culture Training	Final Review of Training Content and Schedule	Training Begins
TECHNOLOGY	Define requirements Phone and CRM		Implement technology changes and upgrades		Testing and Validation		Technology Utilized in Training

Call Center Technology



- InContact provides state of the art telephone solutions
- All media (phone, email, chat) routing, queuing and reporting
- Flexible IVR, CTI and CRM integration
- VOIP delivery to any device and work at home capabilities
- Integrated Quality Monitoring and WFM Scheduling



Some of Our Experts



- **Beverley McClure**
 - Former Operations SVP at USAA and Change Management Expert
- **Michael J. Krahe, Ph.D.**
 - Former Strategy EVP at Erie Insurance and HR Expert
- **Tim Handren**
 - Former COO at USAA and Service Operations Expert
- **Scott Kaepfel**
 - Former VP at WellPoint and Process Engineering Expert
- **Luther Branham**
 - Former Operations SVP at USAA Bank and Finance Expert
- **Jeff Austin, Ph.D.**
 - Former HR SVP at The Scooter Store and Leadership Expert
- **Jeff Lewis**
 - Former SVP at Allstate and Customer Experience Expert

Recent Experience



- Developed and delivered service center improvement awareness programs to thousands of contact center professionals, including most Fortune 500 companies.
- Conducted operational and customer support assessments of contact centers ranging in size from 5 to 40,000 agents. The team has worked in nearly every major industry and has experience with organizations in every phase of maturity.
- Responsible for developing self-service and integrated web strategies that have created millions of dollars in savings and significant service improvements.
- Developed cross-selling desktop tools, incentive programs and service strategies for a variety of contact center support positions.
- Led efforts to shift IT spend from 40% maintenance / 60% development to 30% maintenance / 70% development.
- Direct responsibility for leading cross-functional, multi-line of business executive teams responsible for governance, strategy development, prioritization, execution, and change leadership of customer and contact center strategies in support of strategic and operational plans.
- Led post acquisition integration activity after 4 financial institutions were acquired; completed effort 6 months after start date.

Companies We've Advised



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How Our Clients Feel



"This engagement provided us with a great return on our investment and was highly effective. I would recommend their services to any contact center team regardless of their current capabilities—they will help you take your contact center to the next level."

Carol Trimmer, VP Customer Service Operations, Prime Therapeutics

"Tim brings his entire game to every engagement, and I'd hire him again and again. He delivers, plain and simple. He knows contact centers from every angle... but it's his ability to walk the floor and read the nuances that makes him worth getting to know. He understands mechanics and culture and can help you find the right blend and balance."

David Travers, EVP Service Operations, Farmers Insurance

"The SCOOTER Store was running a very large, but very inefficient call center before we got Tim's help. Today we are doing more work with less people and our management team has better reports and tools to control the processes. If you would like your call center to increase productivity and employee satisfaction while simultaneously reducing cost, you owe it to yourself to call Tim."

Doug Harrison, Founder and CEO, The SCOOTER Store

"They have given us a road map to weave in cost effective productivity while not giving up our call quality focus. We are excited to see these changes positively affect our average cost per contact while maintaining our industry leading quality"

Scott Morgan, CEO Revenue Cycle Partners, LLC

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