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EXCELLENCE IN CUSTOMER EXPERIENCE RESEARCH

Since 1993, we have been delivering Elite customer experience research consulting and managed services to Elite organizations.

We enable our clientele to create a rally cry for the customer that translates into increased employee and organizational performance via highly sophisticated, highly customized research programs.

Customer Relationship Metrics, L.C.
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I. About Us

We believe that education and application of the knowledge gained by experience is the key to unlocking the door to elite performance. It is our commitment to provide excellence in customer experience research intelligence to create a rally cry for the customer by accurately measuring and leveraging the Voice of The Customer.

Metrics Value Statement

Customer Relationship Metrics (Metrics) was founded in 1993 at Purdue University by famed consumer research scientist, Dr. Jodie Monger. Since then, Metrics has been combining the academic and business world by applying scientific methods to measuring an organization's most important asset...its customer base. Through our commitment to consumer research excellence our team has guided organizations in elevating their financial performance by building a foundation in customer-centricity.

Our expertise has been leveraged by organizations to increase market share and shareholder value by transforming their culture using Voice of the Customer feedback. We do this by providing managed research and consulting services. Our expert customer research and quality solutions provide the ability to not only speak of customer-centricity but to actually utilize Voice of the Customer feedback in determining the strategic direction of the organization.



Metrics delivers beyond the contractual scope of assignments through its diverse experience in Voice of the Customer measurement. Companies choose Metrics for scientifically sound research expertise, knowledge of customer satisfaction drivers, and the reliability to deliver critical metrics. Our methodical approach to Voice of the Customer research has made us an industry leader in creating and operating customer satisfaction research.

The team at Metrics serve as advisors for clients and often manages their research programs utilizing automated data collection solutions, research best-practices, and traditional research partners. We implement scientifically valid Voice of the Customer programs that quantify service delivery from the critical perspective of the

customer. We have used our proprietary, advanced-IVR system, CATs® (Completely Automated Telephone surveys), to collect millions of automated surveys. We also use the CATs® system for our award-winning External Quality Monitoring (eQM) programs. Our broad base of clients uses the results as the foundation for managing the customer relationship to be more effective, efficient, and profitable.

In 2004 *Call Center Magazine* expanded the scope of the annual award and added best-in-class services to complement the product awards. In that first year, Metrics received the honor in the inaugural event. Our reputation and influence on the industry stood as a testament of deserving the award and recognition.



In February of 2004, Metrics began the partnership with J.D. Power and Associates (JDPA) to create and conduct the Voice of the Customer audit for their Call Center Certification Program. The JDPA Certification is uniquely different than any other contact center certification program because the results from the Phase II Audit are the sole factor in the awarding of certification.

In September 2006, Metrics partnered with the Call Center Industry Advisory Council (CIAC) to launch a global Agent Certification program for Sales, Service, and Technical Support. Metrics developed the measurement program that verifies the agent competencies. The certification program is part of the accreditation process that promotes frontline competencies and standards in the industry.



In 2007, the eQM program was honored once again for being in the forefront of a movement to turn customer data into information that's useful, accurate and totally empowering. Our commitment to continual improvements in measuring and analyzing First Contact Resolution (FCR) and our commitment on data integrity and reporting are unmatched in the industry.

In 2008, Frost & Sullivan, a global market research analyst firm awarded Metrics the 2008 North American Contact Center Applications Service of the Year Award for our eQM program. They recognized the ease of deployment and the demonstrably superior technical underpinnings of our modeling and for our consistent efforts to deliver our clients a better hold on the customer experience.



As recognition of our expertise, members of our team have been distinguished speakers, faculty, facilitators, and panelists at numerous industry events including, Frost & Sullivan Executive MindXchange, IBM's Advanced Business Institute and at AT&T's College of Contact Center Excellence, ICMI Knowledge Exchange events,

CMP Media events, ICCM events, Advanstar events, Purdue's Call Center Campus events, IPQC events, Shared Insights events, DCI events, EUCI, events, EMACS events, and more.

Our ground breaking research on First Contact Resolution, Call Monitoring and Agent Performance has been recognized world-wide and translated into many languages. For the past several years, we have also provided our research expertise to Montgomery Research, CustomerThink, CMP Media, and CRM Advocate for various studies. The insights generated have been distributed to more than 90% of the Global 2000 business leaders.

II. Consulting Personnel

Dr. Jodie Monger

Jodie Monger, PhD is the President of Metrics, LC (Metrics) and a pioneer in customer satisfaction research. Prior to establishing Metrics, she was the founding Associate Director of Purdue University's Center for Customer-Driven Quality.

Dr. Jodie's expertise is working with organizations to help them quantify the Voice of their Customer. These organizations in turn utilize her research and knowledge to enhance customer satisfaction and their overall customer relationship strategy. She directs them in turning data into actionable business intelligence. She has worked with clients in numerous industry sectors with their Business-to-Business and Business-to-Consumer business units.

Dr. Jodie and her team at Metrics provide the critical tools necessary to measure and manage your most important corporate asset – their customers. For over 14 years Metrics has been combining advanced research technologies and research processes which result in scientifically sound customer research programs that deliver actionable intelligence. Metrics has industry leading expertise and solutions, which enable companies to quantify and thereby improve their customer relationships. For almost 20 years she has been involved with numerous customer experience improvement and measurement projects.

In addition to customer relationship management design and implementation, Dr. Jodie has published several books and numerous articles relating to customer service excellence. Of note most recently are two books co-authored by her and other industry experts: *Customer Relationship Management* published by Prentice Hall and *Contact center Management by the Numbers* published by the Purdue University Press.

For several years Dr. Jodie has been a respected and requested speaker at Frost & Sullivan Executive MindXchange, ICMI Knowledge Exchange events, EUCI, CMP Media events, ICCM events, Advanstar events, and Purdue's Call Center Campus events. She is also a CRM Guru for CustomerThink.com, and on the Advisory Board for CMO Council. Her formal education is in the disciplines of Consumer Behavior, Statistics and Research Methodologies. She earned her PhD and MS from Purdue University and a BS from Juniata College.

Carmit DiAndrea

Carmit DiAndrea is the Vice President of Research and Client Services for Customer Relationship Metrics. Prior to joining Metrics, Carmit served as the Vice President of Behavior Analytics at TPG Telemanagement, a leading provider of quality management services for Fortune 500 companies. While at TPG she assisted clients in measuring behaviors, and provided management services to assist in affecting change based on newly created intelligence. Specifically, she established the behavior analytics department for the organization and helped position TPG as an industry leader in call monitoring analytics.

Carmit has over 11 years of experience in the contact center industry. She has held a number of responsibilities, including General Manager, Operations Manager, Compliance Officer and project and client relationship management. She is an active member of the American Teleservices Association, as a speaker, events coordinator, and a member of the Board of Directors for both the Northeast and Midwest chapters. In addition, she served as a state legislative coordinator for the Mid-Atlantic chapter. As part of her role she participated as a member for the Government Affairs Committee and developed relationships with elected officials in the state houses and on The Hill by being a valuable resource on the teleservices industry and related issues.

Carmit is a native of the Philadelphia area, and has a Bachelor of Arts with a concentration in Statistics from Villanova University and an MBA from the University of Phoenix. Additionally, she is in the final stages in becoming a Six Sigma Black Belt and will be certified by the American Society for Quality (ASQ).

Dr. Debra Perkins

Debra Perkins is Specialty Research Consultant with Customer Relationship Metrics. Debra is a first generation college graduate—the first in her family on either side. She graduated with a BA in English from the local college that has grown, developed, and changed its name to University of Southern Indiana.

While there, Debra added to her Hoosier Scholar and National Merit Scholar honors earned in high school by becoming the recipient of the following:

Wahnsiedler Award for Excellence in Humanities 1973

Indiana State University Evansville Scholastic Achievement Award 1973

Department of Humanities Academic Award 1973

Member of Alpha Psi Omega, Honorary Dramatic Fraternity

Competitive Academic Scholarship 1970-1973

Wishing to attend graduate school to become an English professor, but being faced with overwhelming expenses to earn the degrees and rather grim earnings prospects even if successful, Debra turned to making a living as a Caseworker for the Welfare Department in Marion County. While not exactly financially rewarding, it did provide time for the discovery of the MBA and its potential for making a real living.

Moving from Indiana to Nebraska, Debra earned her MBA and University of Nebraska Regents Award 1979-1981. But timing is everything and after double-digit inflation, the economy slid into a serious recession just at graduation. Eventually Debra moved to Illinois and after a stint as a Technical Recruiter in an agency, took on Finance Chair for a congressional campaign. We raised a lot of money and did well by coming in second in a nine-way race; but second place is not quite good enough. From there Debra began working as a “gypsy” professor at three local colleges where she taught macro and micro economics as well as marketing courses.

Realizing that no benefits and low wages even earned from three institutes does not a living make, Debra was accepted to Indiana University where she completed all the course work for majors in management and marketing and a dissertation with a foot firmly in each camp. She was inducted and remains a member in good standing of Beta Gamma Sigma, the Honor Society for Collegiate Schools of Business.

Debra was thrilled to be accepted by Purdue University and spent the next 5 years there teaching research and retailing studies to undergrad, masters, and doctoral students while publishing and speaking at conferences on consumer behavior – particularly on satisfaction and complaining behavior.

For the next ten years Dr. Perkins and her husband Frank Kirlin ran five small vehicle related businesses in Lafayette and the surrounding area in Indiana. This provided hands-on real world experience in financial, advertising, the full range of

human resources issues, as well as service and production in both retail and wholesale settings.

Eventually the business was sold and she moved to Florida to get back to Debra's love of working with students and teaching. She accepted a position as Associate Professor at Florida Memorial University in Miami Gardens where she teaches Business Law and Ethics, Human Resources, Marketing, and various Management courses to both undergraduate and graduate students. She earned Scholar of the Year, School of Business, 2005-2006 in her first year at Florida Memorial and was an honorary inductee into Delta Mu Delta Honorary Business Fraternity the next year and which she currently serves as faculty advisor.

Dr. Perkins publications include 9 refereed articles in academic journals with 1 currently under review; 14 academic conference presentations; 15 articles in retailing management mostly co-authored with retailing students; 3 articles in contact center journals; 17 presentations in contact center conferences; 2 bibliographies and 3 contact center books in addition to *Survey Pain Relief*.

Jim Rembach

Jim has more than 17 years experience in the customer service and sales industry and has been consulting since 1994 both as an internal consultant and is the Senior Vice President of Customer Relationship Metrics. He has held positions as a team leader, operations manager, program manager, contact center manager, business consultant, project manager, and process consultant. He has the benefit of a well-rounded career with positions that have included responsibilities in people management, training, systems evaluation, process improvement, vendor relations, product assessment, quality improvement, performance management, sales management, team building, and strategic planning. This variety of experience has enabled him to develop a unique, well-rounded ability to enhance people, process, and technology.

Jim developed a holistic approach to managing a successful contact center that serves both internal and external clients. Metric's I.T.E. - E.T.I.™ assessment methodology is the result of years of operations management experience and the conclusion that having an efficient and effective contact center requires a balanced approach that addresses needs in people, process, and technology. Many companies are realizing a need to shift to a more customer focused strategy to be competitive and the contact center is vastly becoming the core of that strategy. This methodology has helped clients to achieve that shift and increase internal and external customer satisfaction, loyalty, profits, and expense control.

Jim has published numerous articles and is a frequent speaker at industry events and can be found as a reference in many journal and media articles. He has

worked to forge partnerships with companies like J.D, Power and Associates to provide Call Center Certification and the Call Center Industry Advisory Council (CIAC) to deliver Representative Certification.

Jim has a B.A. from Appalachian State University, with additional studies in the areas of human resource development, project management, quality management, marketing, and strategic planning. He is a member of CCNG, ICSA, SOCAP, ASE, GCC, and is a Customer Satisfaction Measurement Community coordinator for CCNG and MyCRMExchange.com.

Clifford G. “Cliff” Hurst

Mr. Hurst brings over 28 years of management and leadership experience to every engagement. For the past 17 years he has specialized in the contact center industry. He believes that businesses have only two real assets, its *customers* and its *employees*. He works with companies who share this philosophy to help them grow the value of both.

Mr. Hurst developed an approach to the management of customer satisfaction as a strategic corporate initiative that is known as *Service Quality*. This engagement has helped clients to achieve dramatic turnarounds in customer satisfaction, loyalty, and profits.

Mr. Hurst has been a speaker at national conventions of the American Teleservices Association, the International Customer Service Association, the DMA’s Telephone Marketing Conference, Inc.’s Conference on Advanced Customer Service Strategies, and at Purdue University’s Call Center Campus.

Mr. Hurst is a graduate of the University of Virginia and is a former officer of U.S. Marines. He is a Certified Professional Behavior Analyst. He is an active member of the ATA and ICSA.