

POTENTIAL TOPICS FOR DISCUSSION

- **Success Metrics**
 - Key Performance Metrics and Benchmark Targets
 - Staffing Metrics
- **Talent Acquisition and Retention**
 - Hiring
 - Progression Plans
 - Retention
- **Training and Development**
 - Quality Control
 - Universal vs. Specialized Reps
 - Training
 - Social Media
- **Operations**
 - Member Services Activities
 - Lending Activities
 - Hours of Operations
 - Outbound Activities
 - Workforce and Workflow Management
 - Handling Breaches
 - Partners / Outsourcing
- **Incentives**
 - Service vs. Sales
 - Referrals Incentives
 - Incentive Plans
- **Technology and Channel Use**
 - Chat
 - Overflow
 - Core/online/mobile/other systems conversions:
 - IVR / Phone System Conversion