

## Call Center Management to Create Competitive Advantage

*A member supported Research Program and  
Industry Forum of the Wharton Financial Institutions Center*

*Inn at PENN  
3600 Sansom Street  
Philadelphia, PA 19104  
Phone: 215-222-0200 • Fax: 215-222-4600*

**Financial  
Institutions  
Center**

**Thursday, May 16**

*Inn at PENN*

3:00 p.m. Introduction and Agenda  
*Carol Leisenring*, Co-Director, Financial Institutions  
Center

An introduction to the Wharton Financial  
Institutions Center and the Call Center Forum  
by the Center's Co-Director.

3:30 p.m. Session I—A Personal Tool for Workforce  
Management  
*Avishai Mandelbaum*, Professor of Operations-Research and  
Service-Engineering, TECHNION

Avi Mandelbaum will demonstrate a  
user-friendly tool for workforce management,  
designed for use by both practitioners (managers  
of call centers) and theorists (in the academia).  
Applications include performance analysis and  
staffing optimization, with a focus on managerial  
insight. The tool goes beyond the prevalent  
Erlang-C model by accommodating also  
abandonment and is available on the internet.

5:00 p.m. Break

6:00 p.m. Cocktail Reception

The Wharton School  
University of Pennsylvania  
3301 Steinberg Hall-  
Dietrich Hall  
Philadelphia, PA 19104-6367  
215.898.1279  
fax: 215.573.8757

6:30 p.m. Dinner Speaker  
"Managing the Next Generation of Workers"  
*Peter Cappelli*, Professor of Management, The Wharton School

7:00 p.m. Dinner

Friday, May 17

*Inn at PENN*

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8:00 a.m. Continental Breakfast

8:30 a.m. Session Session II—Skills, Training and Mobility for Call Center Employees

*Larry Hunter*, Assistant Professor of Management, The Wharton School  
*Steffanie Wilk*, Assistant Professor of Management, The Wharton School

Chip Hunter and Steffanie Wilk will discuss their survey findings on how call center employees perceive their mobility opportunities. They will show how employees assess their own skills, and consider employees connect these skills both to further opportunities to grow in their current job and to be promotion opportunities. They will also discuss the sorts of employer-provided training that are most valued by employees.

10:00 a.m. Break

10:30 a.m. Session III—Operational Lessons from Call-by-Call Data  
***Larry Brown***, Professor of Statistics, The Wharton School

Larry Brown's team is currently receiving detailed call-by-call records from a multi-site financial call center. Preliminary examination of this data suggests several operational aspects worthy of general discussion and continued investigation. One of these is a quantification of impatience (and correspondingly poor service) of individual agents. Another aspect involves the efficiency of call assignment among the individual agents and of the transfer of calls from agent to agent. The discussion will be focused on raising operational issues of broader interest in the call center context, rather than on providing answers in this specific operational setting.

11:45 a.m. Session IV—The Contingent Cost of Rudeness in Call Center Service Interactions  
*Lorna Doucet*, Assistant Professor, University of Illinois at Urbana-Champaign

In this study, Lorna Doucet examines factors that serve to moderate the relationship between rudeness by service providers and customer perceptions of service quality. In a study of service interactions in one retail banking call center in the northeastern US, she finds that factors such as timing of negative emotion displays and customer preferences affect the relationship between rudeness by service representatives and customer perceptions of service quality.

12:45 p.m. Buffet Lunch Discussion—Advisory Session  
*Carol Leisenring*, Co-Director, Financial Institutions Center

An important part of the Forum's evolution has been the direction and feedback from industry members. In addition to any suggestions as to how we might improve on the Forum's activities, we will close the formal meeting by asking participants to briefly comment on one issue or challenge facing your business that might benefit from further research.

2:00 p.m. Adjourn

*Call Center Management  
to Create Performance Advantage*

May 16-17, 2002  
Conference Registration Form

Participant Registration

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*Name*

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*Title*

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*Company*

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*Address*

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*Phone*

*Fax*

*E-mail*

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Location

The Inn at PENN  
3600 Sansom Street  
Philadelphia, PA 19104  
(215) 222-0200  
fax: (215) 222-4600

Dress

Business casual.

Dietary Restrictions

Please let us know about any special dietary needs you might have: \_\_\_\_\_

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**Please return this form to:**

Ed Tatum  
Wharton Financial Institutions Center  
3301 Steinberg Hall-Dietrich Hall, Philadelphia, PA 19104-6367  
phone: (215) 573-5838, fax: (215) 573-8757

**Wharton**  
Financial Institutions Center

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May 16-17, 2002

Hotel Accommodations

We have reserved a block of rooms at the Inn at PENN for Thursday night, May 16, at a special group rate of \$164 per night. Reservations should be made directly with the hotel by April 16, 2002, making reference to the "Wharton Financial Institutions Center / Call Center Forum." After April 16, reservations will be taken on a space and rate availability basis only.

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Philadelphia, PA 19104  
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