



NORTHERN CALIFORNIA
CONTACT CENTER
ASSOCIATION

Northern California Contact Center Association Meeting

Agenda

SUCCESS THROUGH PEOPLE

Thursday, June 15, 2017

8:00 – 8:30	Networking
8:30 – 8:45	Introductions and announcements
8:45 – 8:55	Welcome to Clark Pest Control <i>Matt Beckwith, Contact Center Director, Clark Pest Control</i>
8:55 – 9:15	Sponsor, Aerialink <i>Tevis Maher, Vice President Strategy & Business Development, Aerialink</i>
9:15 – 9:45	Recruitment Trends in the Contact Center <i>Heidi Fretwell, Branch Manager, Star Staffing</i>
9:45 – 10:15	Goal Setting for Contact Center Agents <i>Dr. Debra Bentson, Senior Workforce Manager, NHRSC, Kaiser</i>
10:15 – 10:45	Break/Raffle
10:45 – 11:30	Panel Discussion <i>Mari Urrea, Contact Center Manager, Clark Pest Control</i> <i>Sandi Ammons, Manager, Customer Service, Franklin Templeton</i> <i>Lisa Han, Training Manager, California State Teachers' Retirement System</i> <i>Matt Eubanks, Contact Center Section Manager, California State Teachers' Retirement System</i>
11:30 – 11:45	Questions & Answers, Panel Discussion with all presenters
11:45 – 12:00	Raffle/Closing Remarks

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Speaker Biographies

Tevis Maher
Vice President of Strategy and Business Development
Aerialink
tevis.mahar@aerialink.com

Tevis has 20 combined years in IT, mobile communications and new product development. Tevis served as Director, Business Development for enterprise-class solutions at 4CS, Inc. She was responsible for initiating the company direct from an IT outsourcing business, to a SaaS product company, where she helped incubate and grow this practice during its early stages, the Illinois-based company was acquired by PTC in 2011. Tevis holds a Bachelor of Arts Degree in Communications from Loyola Marymount University, Los Angeles, California.

Heidi Fretwell
Branch Manager
Star Staffing
heidi@starhr.com

Servicing the Greater Sacramento area Heidi started working in the staffing industry in 1998 as a Receptionist. She worked her way up, Recruiting, Onsite Management, Branch Management and finally Area Management with her first two companies before coming to Star Staffing as a Branch Manager in 2016. She has a niche understanding of Call Centers after spending time with several national accounts focused on that skill set. She has also worked heavily in the Administrative and Light Industrial spaces having a well-rounded knowledge of the contingent to hire and direct hire market. Having essentially grown up in the Staffing Industry her wealth of knowledge helps to grow relationships and produce stellar results.

Sandi Ammons
Manager, Customer Service
Franklin Templeton
sandra.ammons@franklintempleton.com

Sandi Ammons has been with Franklin Templeton for 25 years. She started her career with the firm as a call center agent and has held various roles and has been in a variety of departments since then including, Institutional Services, Sales/Marketing, Main Office Services – supporting the Back Offices of their distribution partners, Customer Operations and most recently Customer Service. Sandi works out of the Rancho Cordova office.

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Matt Eubanks
Contact Center Section Manager
California State Teachers' Retirement System
MEubanks@calstrs.com

Matt has more than 11 years of experience successfully working and managing in customer service environments for the two largest Pension Systems in the United States. He has worked as Section Manager in the Contact Center at the California State Teachers Retirement System since 2013. Prior to that he was a manager over service credit purchases at the California Public Employees' Retirement System. Matt is a Sacramento native, with a degree in Business Administration and Finance from Sacramento State University and has completed the International Customer Management Institute (ICMI) Essential Skills and Knowledge training in 2016.

Lisa Han
Training Manager
California State Teachers' Retirement System
LHan@CalSTRS.com

Lisa Han began her state career with the California State Teachers' Retirement System in 2008. Prior to entering leadership she was an active contributor on many agency-wide projects as a system matter expert and technical lead. She worked as a Benefits Planning Specialist assisting thousands of members with making educated financial decisions. In her current position as the Customer Service Training and Employee Engagement Manager, Lisa continues to educate and empower California's educators through the comprehensive training program she leads.

Mari Urrea
Contact Center Manager
Clark Pest Control
murrea@clarkpest.com

Mari began her contact center career over 10 years ago at Blue Shield of California. While at Blue Shield, she held various roles within the Call Center, leading teams in Member Service before focusing on projects related to new technology and service delivery. In early 2016 she joined Clark Pest Control where she manages day to day contact center operations out of the company's headquarters in Lodi, California.

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