



# HDI

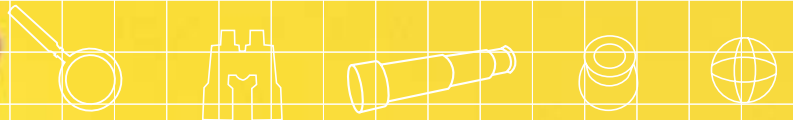
## 2005 Annual Conference & Expo

World Conference on Customer & Technical Support

March 6-10, 2005

The Venetian Resort, Las Vegas

### Discover a New Vision



Featuring Four Exciting Keynotes...



**Scott Adams**  
*The Dilbert Factor*



**Leo Laporte**  
*The Five Most Important Technologies of the Next Decade*



**Tim Sanders**  
*The Likeability Factor*



**Erik Wahl**  
*The Art of Vision*

...and Six Visionary Presentations



**Ron Muns**  
*Industry Perspectives*



**Jennifer James**  
*Thinking in Future Tense*



**Jaclyn Kostner**  
*TOUCH-nology: Virtual Teams*



**Ed Foreman**  
*Making Quality Performance a Lifestyle*



**Terri Sjodin**  
*Avoiding the Nine Biggest Presentation Mistakes*



**Kirk Weisler**  
*Happily Ever After*

### Take Advantage of HDI Conference Discounts:

- Register by December 17th to receive a FREE one-day pre-conference workshop (a \$395 value)!
- Register before January 14th to receive a \$100 early bird discount.
- HDI members and conference alumni receive \$100 discount.

**Register Today!** 800-248-5667 [www.ThinkHDI.com/HDI2005](http://www.ThinkHDI.com/HDI2005)

welcome



**HDI**

**2005 Annual Conference & Expo**

*World Conference on Customer & Technical Support*

## Table of Contents

- 3 Keynote Addresses
- 4 - 5 The Conference Program
- 6 - 7 Visionary Presentations
- 8 - 9 Two-day Pre-conference Workshops
- 8 - 9 The Discoverers Executive Program
- 10 - 11 One-day Pre-conference Workshops
- 12 - 15 Schedule at a Glance
- 16 - 17 The Discovery Zone/Expo Education
- 18 The Networking Zone
- 19 Vertical Visions/Afternoon of Discovery
- 20 - 33 The Learning Zone/Concurrent Sessions
- 34 - 35 Registration & Hotel/Travel Information

## Conference Hosts



**Ron Muns**  
Founder and  
CEO, HDI



**Cinda Daly**  
HDI 2005  
Program Chair



**Kirk Weisler**  
Chief Morale Officer  
HDI

## HDI Strategic Advisory Board



**Joe Fleischer**  
Chair, HDI Strategic  
Advisory Board,  
VP, Chief Technical  
Editor, Call Center  
Magazine



**Mary Cruse**  
Chair, HDI  
Member Advisory  
Board, Manager,  
Cardinal Health  
Systems

**Michele Hudnall**  
META Group, Inc.

**Harlan Hugh**  
Chief Technology Officer,  
TheBrain Technologies, Inc.

**Sophie Klossner**  
Local Chapter Director, HDI

**Peggy Libbey**  
Chief Financial Officer, HDI

**Ron Muns**  
Founder and CEO, HDI

**Greg Oxton**  
Executive Director,  
The Consortium for  
Service Innovation

**David Ratcliffe**  
President & CEO,  
Pink Elephant, Inc.

**E. Sandra Simpson**  
Manager, Global Support  
Center Services, SITA, Inc.

**Phil Verghis**  
President, The Verghis Group

**Ken Wendle**  
Senior Solution Architect,  
Hewlett Packard

**Robert Barnes**  
Senior Vice President,  
Global Service Desk,  
JP Morgan Chase and Company

**Jim Carr**  
Freelance Writer-Media

**Harold Goldberg**  
Remedy, a BMC Software company

**Rich Hanke**  
Director, Enterprise Service Desk,  
Lockheed Martin

**Paula Howell**  
Director, Customer Support Services,  
Ernst & Young

## Conference Management

**Fiona Henderson**, Executive Director of Events  
**Michelle Frilow**, Events Manager

# Discover a New Vision!

**March 6-10, 2005**  
**The Venetian Resort, Las Vegas**

*Dear HDI Members, Friends & Colleagues:*

Come and discover a new vision at the 16th Annual HDI Conference & Expo! HDI is once again proud and excited to host the world's leading event for the service and support profession. The HDI Annual Conference & Expo is the industry's largest and most respected conference for internal and external service and support professionals.

This year's program will help you look into the future, zone in on today's challenges and discover an entire kaleidoscope of new ideas and solutions. HDI 2005 will make a difference in how you do business today and tomorrow. The program will address the needs of customer service and support organizations to maximize performance and productivity, become more strategic, and integrate more effectively with the IT department and the organization as a whole.

***HDI 2005 will make a difference in how you  
do business today and tomorrow.***

We are proud that this year's program deepens the focus on and offerings for veteran professionals dedicated to realizing a new vision for their support centers and taking their organizations to a new level of maturity. And, we continue our comprehensive education for developing support centers and new support managers with HDI certification training and a dedicated track.

You'll benefit from three days of practical knowledge and new ideas from award-winning practitioners and top industry experts. Veteran practitioners — from VPs to front line managers with a keen eye on all aspects of the organization — will share their vision, challenges, mistakes, and victories in case studies from Intel, HP, Marriott International, Novell, Blue Cross Blue Shield, Siebel Systems, TD Bank, Ford Motor Company, J.P. Morgan Chase, Saudi Aramco, J.B. Hunt Transport, CompuCom, FEDEX and more.

From the highest quality professional education in more than 90 breakout sessions, to networking with peers at receptions and our legendary conference festivities, to exploring new products in The Discovery Zone (The HDI 2005 Expo Hall), discover it all at HDI 2005. Ten inspiring thought-leaders will be featured in our Keynotes and Visionary Presentations.

HDI Certification training, an Afternoon of Discovery, HDI's awards programs, local chapter meetings and roundtable discussions, The Launch Pad, parties, receptions, and an exciting new offering called Vertical Visions round out the program at HDI 2005! So, please, come and join us at The Venetian Resort in exciting Las Vegas in March 2005! I look forward to seeing you there!

Sincerely,

**Ron Muns**  
Founder & CEO, HDI

**"The motivational speakers and informative sessions helped me to remember why I got into this business and why I want to continue to help people!"**

PAMELA DAVIS-HOWARD, MANAGER OF END USER SERVICES, TETRA TECH FW



## the keynotes



MONDAY, 4:00 PM - 5:30 PM

### The Dilbert Factor

**Scott Adams**  
*Creator of Dilbert*

Scott Adams spent almost seventeen years as a necktie-wearing, corporate victim working in a numbered cubicle. During this time Scott entertained himself during boring meetings by drawing insulting cartoons of his co-workers and bosses. Eventually a bespectacled character named Dilbert emerged from the doodles. Dilbert has become the poster boy of corporate America, where millions of office dwellers tack Scott Adams's comic strip to their walls.

Scott will talk about his strange journey from cubicle to cartoons, show you the hilarious comics that got him in the most trouble, and give you tips for improving your career. It's the sort of advice you won't hear anywhere else.

*Scott Adams held a variety of — in his words — "humiliating and low paying jobs" prior to Dilbert launching in 50 newspapers in 1989. Today, Dilbert is published in more than 2,000 newspapers around the globe. Scott has 29 books in print, owns two restaurants and is also CEO of Scott Adams Foods, Inc.*



TUESDAY, 8:15 AM - 9:30 AM

### The Five Most Important Technologies of the Next Decade

**Leo Laporte**  
*TV Personality and Broadcaster*

Technology never stands still. Everything we know today will change tomorrow. But how will it change? And how will it affect our businesses and the jobs we do? Technology expert, author and broadcaster, Leo Laporte, looks ahead to five new technologies that will revolutionize IT and business applications, and tells us how we can prepare for them now. He will show the latest gadgets and devices that are precursors to the new world of technology and explain what they tell us about how the tech world will change.

*Leo Laporte is an author, speaker and broadcaster, and hosts "The Screen Savers" on Tech TV. He was managing editor at ZDTV, where he wrote and co-hosted "The Personal Computing Show," which aired on CNBC. He also created and contributed to "The Site," a technology newsmagazine on MSNBC, CNBC International and NBC Superchannel in Europe and Asia, for which he won an Emmy in 1997. Among his other TV credits are "Dvorak on Computers," a high tech radio show, and a variety of reports for PBS networks.*



WEDNESDAY, 8:15 AM - 9:30 AM

### The Likeability Factor

**Tim Sanders**  
*Chief Solutions Officer, Yahoo!, Inc.*

There's a menace out there. It's cutting our profits, and taking away our customers, friends and partners. It's ruining our health, shortening our lives and making them more unpleasant. It's causing our relationships to rot and killing our teams. It's our "L Factor," driven by unlikeable behavior. On a scale of 1 to 10, where 10 is wildly likeable, and 1 is despised by all, too many rate a 3 or a 4.

The practical impact of this phenomena can be seen everywhere. People are more likely to buy from salespeople they like. They purchase products from companies with a high "L Factor." Doctors spend more time in office visits with likeable people and offer them more free advice. Likeable plaintiffs in civil suits are granted more money in settlements. People listen to likeable people more closely. Highly likeable people bring out the best in others.

We all need to possess likeability. Best-selling author Tim Sanders will show you how to boost your "L-Factor" for greater success on all levels.

*Tim Sanders is chief solutions officer at Yahoo! Prior to leading the solutions team, Tim created and led the Yahoo! ValueLab, an in-house think-tank that delivers value-added propositions to prospective and current Yahoo! clients. Tim's new book, The L Factor: The Amazing Power of Being Likeable, is due out in 2005, and deals with the benefits of being friendly, relevant, emphatic and real.*



THURSDAY, 11:15 AM - 12:45 PM

### The Art of Vision

**Erik Wahl**  
*Artist and Innovator*

Your best sustainable edge is achieved by being better at mastering change and innovation than your competition. So, unlearn the rules, break the boundaries, free your thought processes and rediscover your untapped potential. As the landscape for business continues to change, a clear vision is the key to successfully navigating tomorrow's uncharted waters. A recognized artist and speaker, Erik Wahl will use his paintings as a visual metaphor for creating a vision and channelling success strategies in a uniquely fresh and entertaining way.

This presentation will uncover new ways to make your organization more creative, more productive and ultimately more profitable. By breaking apart traditional thinking, Erik will help you to redefine commonly held assumptions and misconceptions about creativity, goals, success and vision. Discover how you can sharpen your creative skills and identify a personal style for inspiring yourself and others to rethink vision and purpose.

*Erik Wahl inspires organizations to transcend mediocrity by becoming more creative. After first working in the business world and playing with his art, he now plays in the business world by working with his art. He founded The Wahl Group, a consulting firm specializing in helping organizations identify breakthrough thinking to achieve extraordinary results. Erik Wahl's special blend of warmth, humor, talent and experience helps audiences identify their unchallenged roadblocks to success.*

**Register Today!** 1-800-248-5667 • [www.ThinkHDI.com/HDI2005](http://www.ThinkHDI.com/HDI2005)

# discover a new vision

HDI hosts the world's leading and most respected event for the service and support profession, the 16th Annual HDI Conference & Expo...

## EXPERIENCE

### The Learning Zone: The Conference

- 4 Inspiring Keynotes
- 6 Visionary Presentations
- 90+ Conference Sessions focusing on internal and external service and support issues
- 9 Pre-conference sessions, including HDI Certification training
- Vertical Visions, education and networking
- Afternoon of Discovery
- The Discoverers Executive Program
- ... and more!

### The Program

The program will feature five tracks:

**Executive Focus** — For senior executives — features the business and operational issues relevant to experienced senior managers responsible for the strategic direction, long-term planning, and support vision for their organization.

**Issues and Answers** — For directors, managers, and project leaders — features issues relevant to leaders responsible for the day-to-day operations and effectiveness of the support center organization.

**The Human Factors** — For all attendees — features principles of leadership, team development, resource maximization, performance management, and personal growth.

**The Technology Zone** — For all attendees — this track complements the program and extends the Expo into the classroom.

**Essentials for New Support Managers** — Features concepts, processes and best practices for new managers and helps tune up and refresh experienced managers on the fundamentals of managing the support function.

## EXPLORE

### The Discovery Zone: HDI 2005 Expo Hall

- Discover the HDI 2005 interactive expo floor
- 80+ leading providers of customer service and CRM tools, knowledge management, self-service and self-help solutions, and the largest array of other technologies, products and services
- Enjoy The Discovery Zone Giveaway
- See the latest products introduced at The Launch Pad
- ... and more!

## PARTICIPATE

### The Networking Zone: Community Building

Enjoy a world of discovering new relationships and strengthening old friendships through a wide variety of networking and community-building opportunities throughout the conference:

- NEW!!! The No SPLAT! Zone
- Welcome Reception
- NEW!!! Vertical Visions
- Daybreak Discussion Groups
- Afternoon of Discovery
- Conference Messaging Center
- HDI Awards Ceremonies
- Local Chapter Meetings
- The HDI 2005 Conference Festivities
- ... and much, much more!

## Issues and Answers

P-1	<b>Help Desk Analyst Boot Camp (HDA)</b>	<i>Certification</i>
P-4	<b>Knowledge-Centered Support (KCS)</b>	<i>Knowledge Management</i>
P-5	<b>The Help Desk Audit: Blueprint for Success</b>	<i>Process Management</i>
P-8	<b>Engineering Service Delivery</b>	<i>Process Management</i>
V-4	<b>Industry Perspectives and HDI Update</b>	<i>Trends &amp; Future Visions</i>
103	<b>The Strategic Power Triangle</b>	<i>ITIL</i>
104	<b>The KM Maturity Model</b>	<i>Knowledge Management</i>
105	<b>And Now For Something Completely Different</b>	<i>Change Management</i>
106	<b>Government Customer Support</b>	<i>Trends &amp; Future Visions</i>
203	<b>Support Behind the Club</b>	<i>ITIL</i>
204	<b>Maintaining Data Integrity at the Help Desk</b>	<i>Process Management</i>
205	<b>Sustaining Change</b>	<i>Performance Management</i>
206	<b>Software Support Community</b>	<i>Trends &amp; Future Visions</i>
303	<b>Implementing Customer Care at BCBS</b>	<i>Customer Service</i>
304	<b>Disaster Recovery for the Support Center</b>	<i>Problem Management</i>
305	<b>Quality-based Performance at Fed Ex</b>	<i>Change Management</i>
306	<b>Higher Education Support Community</b>	<i>Trends &amp; Future Visions</i>
312	<b>Building a Continual Improvement Pgm, Pt 1</b>	<i>Process Management</i>
403	<b>Making Co-sourcing Work at Ford</b>	<i>Outsourcing</i>
404	<b>Leveraging Virtual Call Center Teams</b>	<i>Customer Service</i>
405	<b>Building a World-class Back Office</b>	<i>Process Management</i>
412	<b>Continual Improvement Techniques, Part 2</b>	<i>Process Management</i>
503	<b>Security Issues and the Service Desk</b>	<i>Security</i>
504	<b>Measuring Service Effectiveness</b>	<i>Performance Management</i>
505	<b>Project Mgmt for Help Desk Professionals</b>	<i>Process Management</i>
506	<b>Seven Rules for Mission Critical Support</b>	<i>Customer Service</i>
602	<b>The Four Eyes to Nurturing Your Customers</b>	<i>Customer Service</i>
603	<b>Journey from Ordinary to Being the Best</b>	<i>Process Management</i>
604	<b>Secrets to Successful Web Self-service</b>	<i>eSupport</i>
605	<b>Next Generation Global Business</b>	<i>Trends &amp; Future Visions</i>
606	<b>Vertical Visions: The Open Door</b>	<i>Team Development</i>
703	<b>Charting the Course for Microsoft Support</b>	<i>Trends &amp; Future Visions</i>
704	<b>Using the Right Metrics Effectively</b>	<i>Performance Management</i>
705	<b>Bringing Outsourced Support In House</b>	<i>Outsourcing</i>
706	<b>Vertical Visions: The Open Door</b>	<i>Team Development</i>

## The Executive Focus

P-3	<b>HDI Support Center Director (SCD) 101</b>	<i>Certification</i>
V-1	<b>Thinking in Future Tense</b>	<i>Trends &amp; Future Visions</i>
V-5	<b>TOUCH-nology: Leading Teams Virtually</b>	<i>Trends &amp; Future Visions</i>
101	<b>Viewing IT through a Business Lens</b>	<i>Infrastructure Management</i>
102	<b>Consolidating Multiple Service Lines</b>	<i>Service Management</i>
112	<b>SLM: Cornerstone of Process Maturity, Part 1</b>	<i>Service Management</i>
201	<b>Don't Gamble with Your Future</b>	<i>Business of Support</i>
202	<b>Blindsided!</b>	<i>Trends &amp; Future Visions</i>
212	<b>Implementing SLM Part 2</b>	<i>Service Management</i>
301	<b>Transforming into a Global Service Organization</b>	<i>Global Support</i>
302	<b>Making Support the Competitive Differentiator</b>	<i>Customer Service</i>
401	<b>Diagnosing Your Organizational Structure</b>	<i>Business of Support</i>
402	<b>Does ITIL Make the Service Desk More Important</b>	<i>Infrastructure Management</i>
501	<b>Help Desk TCO</b>	<i>Business of Support</i>
502	<b>Outsourcing IT Infrastructure Support</b>	<i>Outsourcing</i>
601	<b>IT Governance Unraveled</b>	<i>Trends &amp; Future Visions</i>
701	<b>Getting Started with Peer Support Communities</b>	<i>Trends &amp; Future Visions</i>
702	<b>My Gas Tank Is Off Line</b>	<i>Business of Support</i>
E-1	<b>Negotiating the Perils of Rapid Change</b>	<i>Trends &amp; Future Visions</i>
E-2	<b>The Roadmap for the Business Within</b>	<i>Business of Support</i>

# program overview

Discover new best practices. Zone in on proven solutions to challenges, and get a view into the future to foresee emerging trends and strategies. Learn, imagine and dream of new ways to approach day-to-day dilemmas and long-term goals. Gain a new perspective and transform the way you do business. Renew your commitment to delivering excellent service and support to your customers, and improve your organization overall!

## Conference Packages

### The Full Vision Package

(Full Conference Package) — \$1,395

The full conference experience — includes access to all core Conference sessions, Keynotes and Visionary Presentations, The Discovery Zone (The HDI 2005 Expo Hall), networking activities, breakfasts and lunches, parties and receptions.

### The Discoverers Package

(Executive, Education & Networking Package) — \$1,795

An exclusive package for senior executives — includes all Full Vision Package benefits plus special offerings designed to meet the needs of our executive audience. See pages 9 and 34 for details.

## Team Discounts

Bring your entire team to discover an entire universe of new ideas and create your own turnkey off-site experience that will make a difference in how you do business tomorrow.

Register 5, the 6th attends FREE (a \$1,395 value)!  
Call (800) 248-5667 for details on team pricing.

## Who Should Attend

Whether you deliver internal or external support, or both, HDI 2005 will have a wealth of new discoveries for you!

- Service & support professionals providing internal & external support
- Help desk professionals & managers
- IT managers, directors & executives
- Customer service professionals & managers
- CIOs

## The Human Factors

P-6	<b>Culture Vision!</b>	<i>Team Development</i>
P-7	<b>Leadership: The “No-Excuse!” Approach</b>	<i>Team Development</i>
V-2	<b>Avoiding the Nine Biggest Presentation Mistakes</b>	<i>Personal Development</i>
V-3	<b>Maintaining a Winning Spirit</b>	<i>Personal Development</i>
V-6	<b>Give Your People a Story to Tell</b>	<i>Team Development</i>
107	<b>Building Today’s Help Desk</b>	<i>Business of Support</i>
108	<b>What Do the Founding Fathers Know?</b>	<i>Team Development</i>
207	<b>Go Ahead. Don’t Train Your People</b>	<i>Customer Service</i>
208	<b>Implementing Self-responsible Work Teams</b>	<i>Team Development</i>
307	<b>Can Your Hear Me Now?</b>	<i>Personal Development</i>
308	<b>Heart, Mind, and Soul of Extreme Leadership</b>	<i>Personal Development</i>
407	<b>Workplace Morale in a Global Environment</b>	<i>Performance Management</i>
408	<b>Intentional Service</b>	<i>Team Development</i>
507	<b>Managing a Multigenerational Workforce</b>	<i>Team Development</i>
508	<b>Keys to Effective Call Monitoring</b>	<i>Performance Management</i>
607	<b>Mixing Correct Data to Determine Staffing</b>	<i>Process Management</i>
608	<b>Leading the 7 Dwarves</b>	<i>Team Development</i>
707	<b>Total Management Performance Or Else</b>	<i>Performance Management</i>
708	<b>23 1/2 Big Fat Lies About Help Desks</b>	<i>Team Development</i>

## The Technology Zone

P-9	<b>Maximization Process Impact Through Automation</b>	<i>ITIL</i>
109	<b>Tools Maximization</b>	<i>Tools Maximization</i>
111	<b>Cost Control and High Customer Satisfaction</b>	<i>Infrastructure Management</i>
209	<b>Maximizing the Support Tools Infrastructure</b>	<i>Infrastructure Management</i>
210	<b>Optimizing Customer Service Across All Channels</b>	<i>Customer Service</i>
309	<b>Getting on the ITSM Bandwagon</b>	<i>Service Management</i>
310	<b>Self-serve Effectiveness: It’s All About the Users</b>	<i>Customer Service</i>
409	<b>Networking 101 for Non-technical Managers</b>	<i>Tool Savvy</i>
410	<b>Knowledge-powered Support</b>	<i>Knowledge Management</i>
509	<b>Measuring Support Automation in Real-Time</b>	<i>eSupport</i>
510	<b>eSupport Tools: Maximizing Impact</b>	<i>eSupport</i>
609	<b>Developing a Ubiquitous Support Environment with FAQs</b>	<i>eSupport</i>
610	<b>The Next Phase in Identity Management</b>	<i>Security</i>
612	<b>Technology Deployment in the Wireless World</b>	<i>Trends &amp; Future Visions</i>
709	<b>Effectively Managing End User Systems</b>	<i>Infrastructure Management</i>
710	<b>Realizing Results with Managed Services</b>	<i>Outsourcing</i>
712	<b>The Future of Mobility, Part 2</b>	<i>Trends &amp; Future Visions</i>

## Essentials for New Support Managers

P-2	<b>HDI Help Desk Manager (HDM)</b>	<i>Certification</i>
111	<b>Real HD: Mapping Out Help Desk Processes</b>	<i>Process Management</i>
211	<b>Developing an Effective Support Structure</b>	<i>Process Management</i>
311	<b>Tool Selection 101</b>	<i>Tools Maximization</i>
406	<b>Marketing the Value of Support</b>	<i>Business of Support</i>
411	<b>Troubleshooting 101</b>	<i>Process Management</i>
511	<b>Service Desk Metrics: Garbage In — Garbage Out</b>	<i>Process Management</i>
512	<b>Irresistible Marketing Tactics</b>	<i>Business of Support</i>
611	<b>Calming the Chaos of a Reactive Help Desk</b>	<i>Process Management</i>
711	<b>Avoid Service Mediocrity</b>	<i>Customer Service</i>

## Afternoon of Discovery

D 1	<b>The Discoverers, Doug Whittle</b>	<i>Business of Support</i>
D 2	<b>HDI Local Chapter Discovery Zone</b>	<i>Trends &amp; Future Visions</i>
D 3	<b>Global Support: Top Five Issues and Solutions</b>	<i>Global Support</i>
D 4	<b>Outsourcing Unplugged</b>	<i>Outsourcing</i>
D 5	<b>Knowledge Management Unplugged</b>	<i>Knowledge Management</i>
D 6	<b>The No Splat! Zone</b>	<i>Team Development</i>
D 7	<b>Certifying Your Support Center</b>	<i>Certification</i>
D 8	<b>Whose Management Line Is It Anyway?</b>	<i>Team Development</i>
D 9	<b>A Six Sigma Workshop</b>	<i>Quality Management</i>
D 10	<b>SQL Workshop</b>	<i>Tool Savvy</i>
D 11	<b>Key Performance Statistics from Magic</b>	<i>Performance Management</i>

 **Register Today!** 1-800-248-5667 • [www.ThinkHDI.com/HDI2005](http://www.ThinkHDI.com/HDI2005)



# the visionaries

Tuesday, March 8, 2:30 pm - 3:45 pm

## V1 EXECUTIVE FOCUS

I/E Keyword: Trends & Future Visions

### Thinking in Future Tense

Jennifer James

Author and Cultural Anthropologist

Every major system in America is going through a major shift. Major industries, in particular telecommunications, were hit first, and healthcare soon followed. The political, legal and academic systems are facing the same kind of "rightsizing." Leadership in this new era requires the ability to think in new ways. Management requires the skill of thinking about thinking, and knowing how you think and operate. This presentation will provide experience in eight thinking skills including:

- Perspective (Seeing with new eyes)
- Awareness of patterns (Recognizing the future)
- Critical thinking (Understanding the social context)
- Response time (The ability to change and help others change)
- Context (Understanding the past to know the future)
- Effectiveness (Doing more with less)
- New forms of intelligence (Using the rest of your brain)
- Diversity I.Q. (Profiting from diversity)

Think of this special presentation as a workout for your mind, a little brain aerobics, or a blueprint for future success. Jennifer James will leave you energized and optimistic.



*Jennifer James, Ph.D. is a cultural anthropologist, lecturer, writer and commentator. Known around the world for her innovative ideas, Dr. James helps people meet the challenges of today's transitions; her speeches and seminars deal with the dynamics of change and*

*the development of thinking skills. Dr. James is a specialist in areas of cultural change, diversity and marketing intelligence. Dr. James is the author of seven books, including Success Is the Quality of Your Journey, and Thinking in the Future Tense, and has filmed two PBS specials titled, "Thinking in the Future Tense" and "A Workout for the Mind."*

***"This is my fourth conference, and they continue to educate me. I have become a better leader and employee. Thank you, HDI."***

SANDY SEROSKI, DIRECTOR OF INFORMATION SERVICES, CAREY INTERNATIONAL

## V2 THE HUMAN FACTORS

I/E Keyword: Personal Development

### Avoiding the Nine Biggest Presentation Mistakes

Terri Sjodin

Principal, Sjodin Communications

Everybody sells something, whether you're presenting a new idea to your team or the plan for a strategic initiative in the executive suite. What are the nine biggest presentation mistakes people make, and how can you avoid them?

In this presentation, Terri Sjodin will show you how to build and deliver a more polished and effective presentation — one that is persuasive, rather than just informative. You'll learn to develop verbal communication skills for greater impact with customers, management, executives and peers, including how to develop a more creative style and hot tips on visual aids, body language, closing and more. She'll outline the nine biggest mistakes and help you avoid them in your next presentation. You'll learn how to sell yourself through building and delivering a strong "case" for your message, how to present more effectively, whether one-on-one or one-on one hundred, how to develop and maintain credibility and a dynamic, memorable presentation style and how to channel fear and anxiety to work for you vs. against you when public speaking or presenting.



*Terri Sjodin is the principal of Sjodin Communications, a public speaking, sales training and consulting firm. Terri specializes in advancing the persuasive presentation skills of professionals. She is the author of NEW SALES*

*SPEAK — The 9 Biggest Sales Presentation Mistakes and How To Avoid Them. She is also a frequent guest on radio and television talk shows throughout the country. Before forming her own company, she was a top sales producer with both The Achievement Group and Resource Dynamics. Her combination of academic communication theory with practical "street sales" experience casts Terri in the leading role of advising today's professionals on becoming more polished persuasive presenters and adapting to the changing marketplace.*

## V3 THE HUMAN FACTORS

I/E Keyword: Personal Development

### Maintaining a Winning Spirit

Ed Foreman

Founder, Executive Development Systems, Inc.

If there was a way you could:

- Develop a comfortable pattern of happy, healthy, successful daily living
- Recognize and control stress
- Make every day start great and get better
- Improve your self-confidence and sell your ideas
- Develop and maintain a wholesome, positive mental attitude
- Have more energy and enthusiasm
- Live a life that is more enjoyable, productive and fulfilling
- Experience less hassle and develop more balance
- Turn crises into opportunities
- Think, act, look like, and become a total quality winner all day, every day
- Deal more effectively with difficult/impossible people
- Positively improve your overall outlook on life, get more done in less time, have more fun and enjoy life more fully...

You'd probably be interested, right?

In this exciting, refreshing and unforgettable presentation, Ed Foreman will go beyond successful business techniques to show you how to live more healthfully and successfully. Ed believes that total quality management comes about by total quality people living a total quality lifestyle. He is an experienced, successful businessman, former Congressman, and an informed, dynamic speaker who will give you a wake-up call you'll never forget!



*From a poor farm kid, to a self-made millionaire by age 26, Ed Foreman has been elected to the U.S. Congress from two different states (Texas and New Mexico). Ed has been a leader in executive development programs since*

*1960. He is a board member, officer, or major stockholder of a dozen successful corporations, and president of Executive Development Systems. Although first and foremost a private business entrepreneur and investor, Ed Foreman speaks at corporate leadership meetings and conventions throughout the world, and he explains health and physical well-being in a manner that people can understand and inspires them to achieve their best for vitality and longevity.*

Wednesday, March 9, 2:00 pm - 3:15 pm

## mini keynotes

### V4 ISSUES & ANSWERS

I/E Keyword: Trends & Future Visions

## Update on the IT Service and Support Industry and HDI's Leadership Role

Ron Muns  
Founder and CEO, HDI

Recently, there has been an acceleration of change and many major shifts and changes in the IT service and support industry, including the formalization of processes and quality standards, i.e., ITIL, COBIT, Balanced Scorecard, individual and site certifications and HDI's Maturity Model, as well as IT service and support organizations operating as strategic business units.

HDI founder and CEO Ron Muns will provide an industry update, forecast the future (near and long term), and provide practical guidance for IT service and support organizations, and the technology and services vendors who serve them. This presentation will assist you in understanding how you might be impacted by the recent and future changes in the industry.

He will present forecasts based upon work undertaken by the HDI Strategic Advisory Board as well as his experience working with industry leaders from around the world.

HDI has initiated more activities in the last twelve months than ever before in the history of the organization in order to prepare its members and the industry at large for the changing landscape we all face. Ron will review new industry partnerships, current and future HDI activities and how you can take advantage of your many HDI membership benefits.

Don't miss this most important presentation.



Ron Muns is an international leader in the service and support industry, and is frequently quoted on key issues and concerns. He is credited with having a significant global impact on the professionalism of the help desk/customer service industry. A featured speaker at conferences throughout the world, Ron has published some of the most highly rated industry surveys and workbooks. Prior to founding HDI in 1989, Ron was a software engineer, creator of several successful commercial software products, a "Big Six" consultant, and as an IT strategist. Ron was also the founder of Bendata, Inc., a software company providing solutions to the help desk/customer services marketplace. Ron sold Bendata in 1996 and now focuses his energies on meeting the needs of the members of the HDI.

### V5 EXECUTIVE FOCUS

I/E Keyword: Trends & Future Visions

## TOUCH-nology: Best Practices for the World's Most Successful Virtual Leaders!

Jaclyn Kostner, Ph. D.  
President, Bridge the Distance, Inc.

How do you lead with a personal touch when your support organization spans the country or the globe? Today's virtual leaders can spend more than 90% of their time in a different location from many of the people that they lead, and despite hundreds of emails, dozens of web and audio conference meetings, and endless travel, most virtual leaders still feel out of touch. And so do the people in their virtual organizations.

The good news is that it doesn't have to be this way. In fact, with "TOUCH-nology" you can create vibrant team spirit, a warm leadership presence, and stellar results, even when you are not face-to-face with your team. TOUCH-nology is about communicating effectively from afar in ways that touch people and inspire their performance. In this unique presentation, Jaclyn Kostner will provide you with practical, innovative ways in which some of the world's most successful virtual leaders maintain a warm, personal touch that drives their organizations to exceptional success.



Dr. Jaclyn Kostner is an internationally recognized expert on virtual leadership, virtual teamwork, and virtual communication. A best-selling international business author, her books include *Knights of the Tele-Round Table*, *Virtual Leadership*, and *Bionic eTeamwork*. She is often quoted in "The Wall Street Journal," "USA Today," "Fortune," "Time," "Fast Company," "Forbes.com" and "CIO Magazine," among many others. She has appeared on CNNfn, CNBC and hundreds of business talk-radio programs around the world. She is founder and CEO of *Bridge the Distance*, an innovative training and consulting firm.

### V6 THE HUMAN FACTORS

I/E Keyword: Team Development

## Happily Ever After: Giving Your People a Story to Tell

Kirk Weisler  
Chief Morale Officer, HDI

"How was work today?" Every one of your people, including you, goes home from work each day and is asked some form of this question by spouses, roommates or significant others. The answer is a direct reflection on your organization's culture, the spirit of your working climate, even your leadership. The fantastic thing is that with a just a little bit of deliberate planning, shared ownership and a shifted paradigm, you can directly influence the story they tell in response to this ubiquitous question.

Kirk Weisler will showcase success stories of those who have made this shift, and you'll leave this session with their "happy endings" empowering you to go and create even more of your own.

Understanding the seven principles behind these "telling" concept stories will take you and your teams where you want to go — happily ever after!



Kirk Weisler is the chief morale officer of HDI. A veteran of the customer service management industry, Kirk has worked to develop and implement a revolutionary strategy, philosophy and approach to the call center world.

Kirk is widely sought-after to share his insightful stories and foundational philosophy of culture- and team-building with customer service and support center organizations around the country. In addition to his role as professional speaker and trainer, Kirk is currently helping to build a wilderness treatment and training facility for at-risk youth. His unique and diverse background as part of Outward Bound's professional development team, as a former US Army Ranger, and as an experiential team trainer make him a dynamic, outside-the-box motivator, trainer and inspiring and entertaining presenter.



Register Today! 1-800-248-5667 • [www.ThinkHDI.com/HDI2005](http://www.ThinkHDI.com/HDI2005)

# pre-conference workshops

Sunday 8:00 am - 5:00 pm and Monday 8:00 am - 3:00 pm

## Pre-1 ISSUES & ANSWERS

I/E Keyword: Certification



### HDI Help Desk Analyst (HDI HDA) Boot Camp Certification Training

HDI HDA Boot Camp is designed for help desk and customer service and support staff to develop a knowledge and understanding of help desk and support center operations. The course will outline the support center environment's processes, procedures and basic tools and technologies; and includes valuable information and everyday solutions for addressing the attitudes, behaviors and relationships between customers and the support team. It also focuses on essential help desk analyst skills, understanding help desk tools, and problem-solving techniques. Participants will learn the essential skills necessary to manage the various aspects of the support center, such as processes, assets, resources, and security. This course contains all the content necessary to successfully pass the HDI CSS Certification and/or the HDI HDA Certification examinations.

#### What you will learn:

- The importance and benefits of measuring the delivery of customer support
- How to create "win/win" positive interactions with customers and co-workers
- How to identify underlying customer needs
- How to gain agreement with customers, to exceed customer expectations
- The difference between providing solutions and satisfying a customer's psychological needs
- How to deal effectively with a variety of customer situations
- How to work with unrealistic or angry customers
- How to gain satisfied customers through better listening
- The guidelines for problem escalation
- The importance of delegation
- The basic anatomy of computers

## Pre-2 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Certification



### HDI Help Desk Manager (HDM) Certification Training

The HDI Help Desk Manager (HDM) Certification training program provides management with the insight, strategies, and skills necessary to promote their organizations — and their own career development — to the executive management team. This course discusses in detail people and relationship management in a support center setting. The course is designed to provide senior level help desk professionals with the knowledge necessary to successfully manage the strategic and tactical aspects of their support organizations. Upon completion of the course, attendees will be prepared to pass HDI's HDM Certification exam.

#### What you will learn:

- Techniques for managing relationships across the enterprise
- How to plan and manage enhancements to the help desk organization
- Key processes for ensuring successful support center performance
- How to market your services internally/externally
- The latest technologies utilized in a service center
- Benefits of each of the service delivery models
- Outsourcing models and the value of each model
- Negotiation and conflict resolution/management skills
- Methods for building and maintaining high-performance teams
- How to build effective SLAs
- Tips and techniques to assist you in hiring, training, motivating and retaining top-notch employees
- Value of mission/vision statements



## the discoverers



*An exclusive conference experience for senior executives responsible for their organizations' strategic and business direction*



**Doug Whittle**, Host and Facilitator,  
Partner, The Diagonal Group, LLC

Now in its third year, this unique conference-within-a-conference sets a new standard for facilitated dialogue with your peers and provocative thought leadership from business strategist Jim Harris, and organizational strategist, Dean Meyer.

Under the guidance of leadership, change, and organizational development expert, Doug Whittle, you will have a chance to talk with other executives who are facing similar challenges and issues. Doug will facilitate your group discussions with a unique open space model to enhance idea sharing on specific topics you develop and generate action ideas you can implement after the conference.

#### Experience:

- Your choice from among 90 conference sessions, 4 Keynote and 6 Visionary Presentations, including those sessions on the Executive Focus track
- Private breakfast and lunch service with professionally facilitated round table discussions
- Provocative, exclusive luncheon presentations with Jim Harris and Dean Meyer
- Afternoon of Discovery: Discoverers exclusive networking session Tuesday afternoon to continue your open space dialogues
- VIP reception with Ron Muns, the founder of HDI and conference host
- Access to The Discovery Zone Expo, legendary parties, and much more
- Special Discoverers Activity on Monday, details to follow

## Space is limited. Register early!

Make your conference experience even more valuable by taking advantage of preparatory training for HDI Certification or a one-day intensive pre-conference workshop.

# 2-day workshops

### Pre-3 EXECUTIVE FOCUS

I/E Keyword: Certification



## HDI Support Center Director (SCD) Certification Training 101

These courses will provide the necessary framework for providing exemplary executive level direction for the support center. This course is designed to provide attendees with the strategic skills necessary to build, maintain and promote the direction of the support center. Attendees are required to complete the online support center certification self-evaluation prior to class, and will be prepared to embark upon the SCD Certification process upon completion of both SCD 101 and SCD 102.

### What you will learn — Day 1:

- This section of the course will focus on communication skills and organizational development within the support center.
- Tools for evaluating, report and KPI for goals/measurement development
  - Guidelines for maximizing vendor relationships
  - Leadership management development — policy, process and people
  - Strategies for staff mentoring

### What you will learn — Day 2:

- This portion of the course will focus on strategic selling and process leadership for the support center director.
- Finance 101 — cash flow, P&Ls, budget and revenue building strategies
  - Methodologies for successful Knowledge Management
  - ITIL alignment strategies
  - Data analysis strategies — industry trends and organization performance

### Pre-4 ISSUES & ANSWERS

I/E Keyword: Knowledge Management / eSupport

## Knowledge-Centered Support (KCS) Foundations

Knowledge-Centered Support<sup>SM</sup> (KCS) is HDI's emerging set of best practices for knowledge management. Many support and service organizations spend thousands of dollars each year on technology rollouts and upgrades, with minimal satisfaction on the investment. HDI's new KCS course will teach you how to transform mere information into knowledge, action and excellence! Find out how to adopt a KCS strategy that will allow you to shift your support center from a call-centric model to a knowledge-oriented model, thus providing the highest level of service and support to your customers. This course is designed for support center professionals, supervisors, managers, and directors responsible for managing their support centers' resources and improving service levels through the use of knowledge management strategies to improve efficiency and maximize customer satisfaction.

### What you will learn:

- How to assess the value of knowledge-centered support
- The difference between call-tracking and knowledge management systems
- The concept behind the re-use of knowledge and value of tracking the re-use
- How to understand KCS principles and practices
- How KCS fits in to the workflow and the structured problem solving process
- How to examine the fundamentals of solution management
- How to identify key roles and responsibilities
- Organizational role
- Employees' role
- Manager's role
- An appreciation for a new way to assess performance and contribution
- Considerations for a successful adoption and implementation of the strategy

## Executive Luncheon Presentations

TUESDAY, MARCH 8

### Blind Curves: Negotiating the Perils of Change

Jim Harris, Principle, Strategic Advantage



We are experiencing a faster rate of change than ever before. Companies' restructure, merge, downsize and reorganize. Technology is changing at a dizzying rate. Individuals feel overwhelmed by work. At times it seems impossible to keep up with the changes. Yet, the rate of change is accelerating. The key to avoid being blind-sided is increasing the speed of recognizing and responding to change.

Jim will extend the concepts from session 202, Blindsided!. He will address several principles to help you navigate the perils of change. Jim will uncover key laws shaping the future, offer pertinent, useful strategies and examples on how to avoid being blindsided, and then entertain your questions.

WEDNESDAY, MARCH 9

### Change-Oriented Leadership: Roadmap to the Business Within

Dean Meyer, President, NDMA



For leaders ready to take their organizations to the next level of performance — those who are tired of fighting alligators and are ready to drain the swamp — there's a scientific way to plan a transformation process. Dean will guide you through the process of describing your vision of a high-performance business-within-a-business, measuring the gaps, diagnosing the organizational root causes of the gaps, and developing a leadership action plan to implement their vision. He will extend the concepts from session 402, Understanding the business-within-a-business, and offer tools you need to systematically build a high-performance organization and then entertain your questions.

\* Luncheon Presentations exclusive to Discoverers Package participants only

# pre-conference workshops

Monday, March 7, 8:00 am - 3:00 pm

## Pre-5 ISSUES & ANSWERS

I/E Keyword: Process Management

### The Help Desk Audit: Blueprint for Success

**Julie Mohr**, *Managing Consultant, Alternative Resources Corporation*

IT managers today must find creative ways to improve IT services with smaller budgets and fewer resources. In an effort to assist IT managers, this session will identify areas of weakness within your support environment and provide practical, step-by-step improvement strategies.

This workshop conducts audits in all critical areas of the support environment including help desk foundation, people, process, tools and customer relationships. Each audit rates the maturity of the organization as advanced, mature, emergent or immature. The help desk audit is one of the most useful tools in analyzing your support operations. The audit process identifies areas of weakness even in mature organizations and support environments with seasoned professionals.

During this full day workshop, you will go through an evaluation of your own help desk environment. Attendees will share their experiences and compare their operations to industry best practices.



*Julie Mohr is has 14 years of experience in the IT industry with eight years of progressive management responsibility in information technology services. Julie provides imaginative insight, dynamic leadership and innovative management to successfully transform IT service organizations into best practice, customer-focused environments.*

## Pre-6 THE HUMAN FACTORS

I/E Keyword: Team Development

### Culture Vision!

**Kirk Weisler**, *Chief Morale Officer, HDI*

Your people are the best. They're cool. They're fun. They're also overworked. They have experienced lay-offs, mergers, outages, restructuring, call spikes, change on top of more change. They may be dealing with the rumors and realities of outsourcing. Your people need a good laugh and need to feel the love. Chances are that you do, too!

It's time to enrich the culture, create connections and build a power-positive community at your help desk. If you're looking for ideas, activities and really fun stuff you can take home with you and use to enhance your team's spirit with only a few minutes to spare a day, this session is for you! You'll leave this workshop with a 52-week plan for building a positive culture that will only take 2-7 minutes per week! With this plan and a few simple tools, you'll be ready to go! Come ready to learn, play, and take away!



*Kirk Weisler has developed and implemented revolutionary strategies, philosophies and a unique approach to the support/call center world. He is widely sought-after to share his insightful stories and foundational philosophy of culture forming and team building with customer service and support center organizations around the globe.*

## Pre-7 THE HUMAN FACTORS

I/E Keywords: Personal and Team Development

### Leadership: The "No Excuse!" Approach

**Jay Rifenburg**, *Founder, Rifenburg Training & Development Center*

The attitude and productivity of the team stems directly from the ambition and effectiveness of the leader or coach. So, what are the differences between managing and coaching in a business environment? What are the attributes of a great coach? How can I effectively hire, set goals and provide incentives for my employees? What does it really mean to 'set the example'? How do I make changes without disrupting the organization? What are the essential skills of communication? How can I create a learning environment for my staff? What are the most effective ways of providing recognition and reward? Spend a day with Jay Rifenburg in this interactive workshop, as he helps you answer these questions for your organization.



*Jay Rifenburg is author of the international best-seller, No Excuses! — Key Principles for Balancing Life & Achieving Success, awarded Book of the Year by the North American Book Dealers Exchange. Jay is a professional speaker, trainer and consultant, and was recognized as the "Outstanding New Yorker in the Field of Business" for 1995. He has provided his expertise in the areas of personal development, leadership and communication training to Fortune 500 companies, associations and schools across the nation.*

**Register to attend HDI 2005 by the Early Bird deadline of December 17th, 2004, and save \$100 — plus, choose from one of these outstanding one-day Pre-conference Workshops — for FREE!**

**“There are many industry training opportunities... But the HDI Conference is the one that I would build my schedule around. I can't miss this.”**

ED KOPIKA, MANAGER, HILTON HOTELS CORP.

# 1-day workshops

## Pre-8 ISSUES & ANSWERS

1/E Keywords: ITIL and Process Management

### Engineering Service Delivery for Your Environment

**Joel Ramseyer**, *Founding Partner, The Diagonal Group, LLC*

**Jennifer Streitwieser**, *Partner, The Diagonal Group, LLC*

Do you ever miss a commitment to a customer because resolution ownership is unclear?

Would your customers be delighted if you consistently set (and met) expectations?

Is true customer advocacy part of the service culture you want to lead?

Want to have fun and learn a valuable new skill set that can translate beyond the help desk? If you said “YES” to any of the above questions, join us for this high-energy workshop. This interactive session will provide you with a service delivery toolkit and ideas for making ITIL-based concepts come to life in your service environment. This is the real deal, not theory. This session is filled with real concepts and tools that you can begin putting into practice as soon as you return to the office.



*Joel Ramseyer focuses on helping clients understand and manage the cultural and organizational impact of their customer service initiatives. He works with companies from Fortune 500 to dot-com start-ups focusing on customer service call centers, field sales force teams, IT support organizations and business alliance groups.*



*Jennifer Streitwieser brings 14 years of management and consulting experience to The Diagonal Group, and her background in technology and marketing enables her to help clients develop complete solutions that encompass sales, service and support.*

## Pre-9 THE TECHNOLOGY ZONE

1/E Keyword: Tools Maximization and ITIL

### Maximizing Process Impact through Automation

**George Spalding**, *Executive Consultant, Pink Elephant*

There are those who preach that processes alone are the path to IT righteousness, and others who say that their tools can take you to the other side. But the truth is that processes are inefficient and costly without automation, and will be abandoned quickly. Tools, on the other hand, without supporting processes, are just more expensive software systems that don't get used to their full potential. This session will explore, in-depth, the criteria for tool selection, the implementation project phase and the process-by-process breakdown of integration specifics. You'll learn how to maximize the technology to specifically support your ITIL best practice initiatives and quality management objectives; proper tool selection criteria and where to find more; what you should expect to automate now and tomorrow; specific process components that should be able to be linked; when you should be shopping and an overview of the marketplace today.



*For more than 25 years, George Spalding has been helping individuals on five continents realize their full potential by simplifying complex topics and inspiring people to acquire new skills. After his appointment to the faculty at Yale University in 1972, he spent several years as a consultant to the White House on technical presentations and White House Conferences. During that same period, he coordinated technical presentations for members of the President's cabinet, the Smithsonian Institution, the National Institutes of Health and the Federal Bureau of Investigation.*

## experience

Discover a new vision through the most in-depth professional education available for the service and support profession! HDI 2005 will feature more than 90 future-facing sessions in **The Learning Zone** — featuring four exciting **Keynotes** and six **Visionary Presentations** from industry leaders, educational sessions in **five robust tracks** led by the industry's foremost speakers and instructors, case studies from leading organizations, **in-depth one- and two-day pre-conference sessions**, including **HDI Certification** preparation courses and more! (See pages 12-15 for details.)

## explore

The HDI 2005 Expo Hall — **The Discovery Zone** — will provide you with a valuable opportunity to explore and discover the **latest tools and services for IT and customer support from nearly 80 top vendors**. This interactive expo will feature hands-on demonstrations. **The Launch Pad** will showcase the unveiling of the **hottest new product and service introductions** for today and tomorrow! Explore **The Discovery Zone** during the **Welcome Reception** on Monday evening, and don't miss the **Expo Prize Giveaway** on Wednesday afternoon! (See pages 16-17 for details.)

## participate

The HDI 2005 Conference & Expo offers you **The Networking Zone** — the best opportunity to network with peers and industry leaders. Take advantage of the **No SPLAT! Zone** for fun and ideas. Participate in the **HDI awards programs, HDI Local Chapter meetings, Vertical Visions, The Story Zone, an Afternoon of Discovery** and more! And, don't miss out on **The Party Zone**, featuring a welcome reception and other legendary **Conference Festivities!** (See pages 18-19 for details.)



**Register Today!** 1-800-248-5667 • [www.ThinkHDI.com/HDI2005](http://www.ThinkHDI.com/HDI2005)

# schedule at a glance

*“As a new help desk manager, there is no tool or experience better than the HDI Conference. This is a must for new managers. I had so much fun, got great education, and met people I’ll definitely keep in touch with.”*

PHIL O’HARA, IT SUPPORT SUPERVISOR,  
MEDRAD, INC.

Follow these simple colors and codes to quickly find topics suited to your concerns

Color Key for Support Role

- Executive Focus for senior executives
- Issues & Answers for line and staff directors and managers
- The Human Factors for all audiences
- The Technology Zone for all audiences
- Essentials for New Support Managers for managers new to technical support

Code Key for Customer Focus

- I Internal customer technical support
- E External customer technical support
- I/E Content pertinent for all audiences

## Sunday, March 6

7:00 am - 8:00 am Registration and Information

8:00 am - 5:00 pm Two-day Pre-Conference Workshops (day one)

**Pre-1 - I/E**  
HDI Help Desk Analyst Boot Camp (CSS and HDA Certification)

**Pre-2 - I/E**  
HDI Help Desk Manager (HDM Certification)

**Pre-3 - I/E**  
HDI Support Center Director (SCD Certification) 101

**Pre-4 - I/E**  
Knowledge-Centered Support (KCS) Foundations

3:00 pm - 6:00 pm Registration Desk Reopens

## Monday, March 7

7:00 am - 6:00 pm Registration and Information

8:00 am - 3:00 pm Day two of Two-day Pre-Conference Workshops

8:00 am - 3:00 pm One-day Pre-Conference Workshops

**Pre-5 - I/E**  
The Help Desk Audit: Blueprint for Success  
**Julie Mohr**

**Pre-6 - I/E**  
Culture Vision!  
**Kirk Weisler**

**Pre-7 - I/E**  
Leadership: The “No Excuse!” Approach  
**Jay Rifenburg**

**Pre-8 - I/E**  
Engineering Service Delivery for Your Environment  
**Joel Ramseyer and Jennifer Streitwieser**

**Pre-9 - I/E**  
Maximizing Process Impact Through Automation  
**George Spalding**

12:00 pm - 3:30 pm HDI Local Chapter Officers Meeting

3:10 pm - 3:45 pm Conference Optimizer and No SPLAT! Zone

4:00 pm - 5:30 pm **Keynote Presentation: The Dilbert Factor, Scott Adams**

5:30 pm - 8:00 pm “The Discovery Zone” Expo Open

5:30 pm - 8:00 pm Conference Welcome Reception

# Tuesday, March 8

7:00 am - 5:30 pm **Registration and Information**

7:00 am - 8:00 am **Continental Breakfast: Daybreak Discussions, Vertical Visions, The Story Zone, and "The Discoverers" Executive Breakfast**

8:15 am - 9:30 am **Keynote Presentation: The Five Most Important Technologies of the Next Decade, Leo Laporte**

9:45 am - 11:00 am **Breakout Sessions: Block 1**

**101 - I/E**  
Change to Win:  
Viewing IT through  
a Business Lens  
**Brian Bell**

**102 - I/E**  
Consolidating Multiple  
Service Lines  
**Ron Hurle**

**112 - I/E**  
Discoveries in Depth:  
Part 1 - SLM: The  
Cornerstone of Process  
Maturity  
**Char LaBounty**

**103 - I/E**  
The Strategic Power  
Triangle: The Next  
Generation Service Desk  
**Brenda Iniguez**

**104 - I/E**  
The KM Maturity Model  
**Rick Joslin**

**105 - I/E**  
And Now For Something  
Completely Different  
**Doug Whittle**

**106 - I/E**  
Vertical Visions:  
Government Customer  
Support

**107 - I**  
Building Today's Help  
Desk  
**Katherine Spencer Lee**

**108 - I/E**  
A New Age of Passion  
from an Old School of  
Thought  
**Art Coombs**

**109 - I/E**  
Tools Maximization: A  
Foundation for Success  
**Judy Benda**

**110 - I**  
Cost Control AND High  
Customer Satisfaction  
**Ken Wells**

**111 - I/E**  
Real HD: Mapping Out  
Help Desk Processes  
**Julie Mohr**

11:15 am - 12:30 pm **Breakout Sessions: Block 2**

**201 - I/E**  
Don't Gamble with Your  
Future  
**Greg Oxton**

**202 - E**  
Blindsided!  
**Jim Harris**

**212 - E**  
Discoveries in Depth: Part  
2 - Implementing SLM in  
a High Tech Company  
**Peggy Gerace-Roosa,  
Will Fabian**

**203 - I**  
Support Behind the Club  
**Marty Woodford**

**204 - I/E**  
Maintaining Data Integrity  
at the Help Desk  
**Jeff Battaglinio**

**205 - I/E**  
Sustaining Change in a  
Change Resistant  
Environment  
**Mark Rosenberger**

**206 - E**  
Vertical Visions: The Future  
of Software Support  
**John Custy**

**207 - E**  
Go Ahead. Don't Train  
Your People  
**Tim Nelson**

**208 - I/E**  
"No Excuse!" Teaming:  
Implementing Self-  
responsible Work Teams  
**Jay Rifenburg**

**209 - I/E**  
Maximizing the Support  
Tools Infrastructure  
**Michael Devaney**

**210 - E**  
Project Genesis:  
Optimizing Customer  
Service Across All  
Channels  
**Kenny Bunnell**

**211 - I/E**  
Developing an Effective  
Support Structure  
**Kristin Robertson**

12:00 pm - 6:30 pm **"The Discovery Zone" Expo Hall Open**

12:30 pm - 2:30 pm **Lunch**

12:30 pm - 2:30 pm **"The Discoverers" Executive Luncheon & Networking — Blind Curves: Negotiating the Perils of Rapid Change, Jim Harris**

2:30 pm - 3:45 pm **The Visionaries**

**V1:** Thinking in Future Tense, Jennifer James  
**V2:** Avoiding the Nine Biggest Presentation Mistakes, Terri Sjodin  
**V3:** Maintaining a Winning Spirit, Ed Foreman

4:00 pm - 5:15 pm **Afternoon of Discovery**

**D-1:** "The Discoverers" Executive Networking, **Doug Whittle**

**D-2:** HDI Local Chapter Discovery Zone, Host: **Mary Cruse**

**D-3:** Global Support: Top Five Issues and Solutions,  
Moderator: **Phil Verghis**

**D-4:** Outsourcing Unplugged, Moderator: **Kristin Robertson**

**D-5:** Knowledge Management Unplugged, Moderator: **Rick Joslin**

**D-6:** The No SPLAT! Zone, **Mark Rosenberger, Greg Cortopassi**

**D-7:** Site Certification: Goals, Process, and Results,  
Moderator: **Carrie Higday**

**D-8:** Whose Management Line Is It Anyway? **Kirk Weisler, Art Coombs**

**D-9:** A Six Sigma Workshop: Applied Concepts, **Fred Van Bennekom**

**D-10:** SQL Workshop for Help Desk Managers, **Jeff Davis**

**D-11:** Assembling Key Performance Statistics from Support Magic,  
**Tony Krasinski**

6:30 pm - 9:30 pm **Dinner Groups and Networking**

# schedule at a glance

Executive Focus

Issues & Answers

The Human Factors

The Technology Zone

Essentials for New Support Managers

## Wednesday, March 9

7:00 am - 5:30 pm	Registration and Information
7:00 am - 8:00 am	Continental Breakfast: Daybreak Discussions, Vertical Visions, The Story Zone, and "The Discoverers" Executive Breakfast
8:15 am - 9:30 am	Keynote Presentation: The Likeability Factor, Tim Sanders
9:45 am - 11:00 am	Breakout Sessions: Block 3

<p><b>301 - I</b> Transforming into a Global IT Service Organization <b>Christof Recknagel</b></p> <hr/> <p><b>302 - E</b> Making Support the Competitive Differentiator <b>Lala Mamedov, Claire Gribbon</b></p>	<p><b>303 - I</b> We Are Aware and We Care, <b>Anna Guy</b></p> <hr/> <p><b>304 - I/E</b> Disaster Recovery for the Support Center, <b>Jeff Davis</b></p> <hr/> <p><b>305 - E</b> Quality-based Performance: Changing the Culture, <b>Dawn Roussey, Jeni McCreary</b></p> <hr/> <p><b>306 - I</b> Vertical Visions: Tech Support in Higher Education <b>Mark Fitzgerald</b></p> <hr/> <p><b>312 - I/E</b> Discoveries in Depth: Part 1 — Building a Grass-Roots Continual Improvement Program <b>David Northcutt</b></p>	<p><b>307 - I/E</b> Can You Hear Me Now? <b>Joel Ramseyer</b></p> <hr/> <p><b>308 - I/E</b> Discovering Your Heart, Mind and Soul of EXTREME Leadership <b>Dave Timmons</b></p>	<p><b>309 - I</b> Getting on the ITSM Bandwagon Isn't As Scary As You Think <b>Russell McGowan, Robert Stroud</b></p> <hr/> <p><b>310 - I/E</b> Self Service Effectiveness: It's All About the Users <b>David Kay</b></p>	<p><b>311 - I/E</b> Tool Selection 101 <b>Jennifer Streitwieser</b></p>
--	--	---	---	---

### 11:15 am - 12:30 pm Breakout Sessions: Block 4

<p><b>401 - I/E</b> Understanding the Business-within-the-Business <b>Dean Meyer</b></p> <hr/> <p><b>402 - I/E</b> Does ITIL Make the Service Desk More Important? <b>Malcolm Fry</b></p>	<p><b>403 - I</b> Making Co-sourcing Work at Ford Motor Company <b>Kevin Blackmore, Tami Schultz</b></p> <hr/> <p><b>404 - E</b> Leveraging Virtual Call Center Teams to Improve Service Delivery <b>Georgann Beville</b></p> <hr/> <p><b>405 - I/E</b> Vertical Visions: Banking &amp; Financial Services — Building a World-class Back Office <b>Robert Barnes</b></p> <hr/> <p><b>412 - E</b> Discoveries in Depth: Part 2 — Continual Improvement Techniques for Customer Service Professionals <b>David Northcutt</b></p>	<p><b>407 - I/E</b> Workforce Morale in a Global Service Environment <b>Darin Vandecar</b></p> <hr/> <p><b>408 - I/E</b> Intentional Service <b>Greg Cortopassi</b></p>	<p><b>409 - I</b> Networking 101 for Non-Technical Professionals <b>Todd Lammle</b></p> <hr/> <p><b>410 - I/E</b> Knowledge-powered Support <b>Beth-Anne Dancause, Scott Schwartzman</b></p>	<p><b>406 - I/E</b> How to Market the Value of Support <b>Paul Dooley</b></p> <hr/> <p><b>411 - I/E</b> Troubleshooting 101: Effective Information Gathering Techniques <b>Martha Lundgren</b></p>
---	--	---	--	--

12:00 pm - 5:30 pm	"The Discovery Zone" Expo Hall Open
12:30 pm - 2:00 pm	Lunch
12:30 pm - 2:00 pm	"The Discoverers" Executive Luncheon & Networking — Road Map for the Business Within, Dean Meyer
2:00 pm - 3:15 pm	The Visionaries

- V4:** Industry Perspectives and HDI Update, **Ron Muns**
- V5:** TOUCH-nology: Best Practices for World's Most Successful Virtual Leaders, **Jaclyn Kostner**
- V6:** Happily Ever After: Giving Your People a Story to Tell, **Kirk Weisler**

3:30 pm - 4:45 pm

## Breakout Sessions: Block 5

**501 - I**  
Help Desk TCO: Revealing Best Practices  
**Chris Farver, Steve Cain**

**502 - I**  
Outsourcing IT Infrastructure Support with Virtual Teams  
**Theresa Tolkinen, David Fletcher**

**503 - I**  
Security Issues and the Service Desk  
**George Spalding**

**504 - E**  
Measuring Service Effectiveness  
**Fred Van Bennekom**

**505 - I/E**  
Project Management for Help Desk Professionals  
**Ric Mims**

**506 - E**  
Seven Rules for Mission-critical Support  
**Arun Shukla**

**507 - I/E**  
Successfully Managing a Multigenerational Workforce  
**Dianne Durkin**

**508 - E**  
The Sound of Quality: Keys to Effective Call Monitoring  
**Mary Cruse**

**509 - I/E**  
Measuring Support Automation Success in Real-time  
**William Mahan, Michael Lehane**

**510 - I/E**  
E-support Tools: Maximizing Impact  
**Tom Smetana**

**511 - I/E**  
Service Desk Metrics: Garbage In — Garbage Out  
**Gary Case**

**512 - I/E**  
Irresistible Marketing Tactics for Your Support Center  
**Heather Donnelly**

5:00 pm - 5:30 pm

"The Discovery Zone" Expo Hall Prize Giveaway

7:00 pm - 10:00 pm

Conference Festivities

# Thursday, March 10

7:00 am - 1:00 pm

Registration and Information

7:00 am - 8:00 am

Continental Breakfast: Daybreak Discussions, Vertical Visions and The Story Zone

8:15 am - 9:30 am

## Breakout Sessions: Block 6

**601 - I**  
IT Governance Unraveled  
**Troy DuMoulin**

**602 - E**  
The Four Eyes to Nurturing Your Customers  
**Eric Rabinowitz**

**603 - I**  
From Ordinary to Best-in-Class: Saudi Aramco  
**Fawzi Al-Matar**

**604 - E**  
Secrets to Successful Web Self-service, **James Irion**

**605 - I/E**  
Global Business: Getting High Performance Virtually  
**Jaelyn Kostner**

**606 - I/E**  
Vertical Vision: The Open Door

**607 - I/E**  
Shaken, Not Stirred: Mixing Correct Data to Determine Staffing  
**Jeanette McGillicuddy**

**608 - I/E**  
Leading the Seven Dwarves: It's Harder Than You Thought  
**Joanne Smikle**

**609 - I/E**  
Developing a Ubiquitous Support Environment with FAQs  
**Kaneto Kanemoto, Tatsumi Yamashita**

**610 - I**  
The Next Phase in Identity Management: Extended Provisioning  
**Kurt Johnson**

**612 - I**  
Discoveries in Depth: Part 1 — Technology Deployment in the Mobile and Wireless World  
**Todd Lammle**

**611 - I/E**  
Calming the Chaos of a Reactive Help Desk  
**Stephen Sellaro**

9:45 am - 11:00 am

## Breakout Sessions: Block 7

**701 - I/E**  
Getting Started with Peer Support Communities  
**Greg Oxton**

**702 - I**  
My Gas Tank Is Off-line  
**Ken Wendle**

**703 - I**  
Charting the Course for Microsoft Product Support  
**J.J. Murray**

**704 - E**  
Using the Right Metrics Effectively  
**Kitty Chaney-Reed**

**705 - I**  
Bringing Outsourced Support In House  
**Jonathan Wester, Michael Sherry**

**706 - I/E**  
Vertical Visions: The Open Door

**707 - I/E**  
Total Management Performance — or Else  
**Steve Murtagh**

**708 - I/E**  
23 1/2 Big Fat Lies About Help Desks  
**Barry Leinbach**

**709 - I**  
Managing End User Systems to Achieve Proactive Support  
**Kim Hunter-Peat, Howie Markson**

**710 - I/E**  
Realizing Results with Managed Service Solutions

**712 - I/E**  
Discoveries in Depth: Part 2 — The Future of Mobility  
**Todd Lammle**

**711 - I/E**  
Avoid Service Mediocrity: Soaring with Eagles Instead of Flocking with Pigeons  
**Jim McKennan**

11:15 am - 12:45 pm

Keynote Presentation: The Art of Vision, Erik Wahl



## the discovery zone

### Expo Hours

Monday, March 7: 5:30 pm - 8:00 pm

Tuesday, March 8: 12:00 pm - 6:30 pm

Wednesday, March 9: 12:00 pm - 5:30 pm

**The Discovery Zone — HDI 2005's Expo Hall** — is the most comprehensive place to learn about the latest tools and services for the help desk, IT service desk and customer support organization.

This robust expo hall will feature nearly 80 vendors of problem and change management, email management, knowledge management, virtual support, self-help, self-service, call center technology, customer and electronic relationship management technology, enterprise technology, training and more.

### The Launch Pad

These 15-minute rapid-fire new product demos will highlight the latest and greatest products in the industry. You'll see what's here today, and hear about what lies just around the corner in future product development. Be among the first to witness the launch of new products and major releases from top solutions providers, presented live from our Expo Main Stage, the Launch Pad!

## HDI 2005 Exhibitors As of October 1, 2004



### Interested in Exhibiting?

Don't miss out on the best opportunity in the service and support industry to reach nearly 2,000 targeted decision makers as they evaluate help desk, customer service and support solutions, technologies, products and services. Become a sponsor or exhibitor of HDI 2005 today. For more information, call Cheri Bruno at (781) 259-4230 or email [cbruno@thinkhdi.com](mailto:cbruno@thinkhdi.com)

**"HDI's Annual Conference is NOT to be missed!"**

BARBARA ANDERSON, HELP CENTER TEAM COORDINATOR, CATERPILLAR FINANCIAL

# HDI 2005 expo hall

## Exhibit Hall Activities, Promotions and Special Give-aways

*Don't miss these activities in the Discovery Zone!*

### Monday, March 7th Welcome Reception

Conference attendees will gather along the HDI 2005 Discovery Zone for a Welcome Reception from 5:30 pm - 8:00 pm. This is an opportunity for attendees to explore the tools and technologies represented in the Expo in a relaxed, fun environment.

### Wednesday, March 9th Prize Giveaway

HDI will hold a Prize Giveaway Session at 5:00pm on the HDI 2005 Launch Pad Stage! Attendees can enter to win dozens of exciting, valuable prizes donated by exhibitors.

Take part in the HDI 2005 Discovery Zone Expo Grand Prize Giveaway game. Visit key exhibitors in the HDI 2005 Expo Hall to become eligible to win a wide variety of great prizes!

## Expo Education — Product Showcases

HDI 2005 will feature special vendor-sponsored sessions for anyone searching for the latest service and support products. Get an up-close look at the features and benefits of leading support tools and technologies and learn how other organizations are successfully using these tools in these in-depth demonstrations.

**Network America**

**REFLECTENT**

**SIEBEL**  
eBusiness

**TechTeam**

**PCHELPS** SUPPORT INC.

**Remedy**  
a BMC Software company

**spherion**  
Technology Services

**TELEPHONE DOCTOR**  
CUSTOMER SUPPORT TRAINING

**Peregrine**  
SYSTEMS

**Right Answers**  
The Knowledge-Pak Company

**Symon**  
Real-time Communication Solutions



**PLANTRONICS**  
World Leader in Communications Headsets

**ROBERT HALF  
RH TECHNOLOGY**  
Information Technology Professionals

**SupportSoft**

**Touchpaper**  
where support starts

**PRIMUS**  
knowledge solutions®

**ServiceWare**  
Technologies

**TechExcel**

**vocent**



**Register Today!** 1-800-248-5667 • [www.ThinkHDI.com/HDI2005](http://www.ThinkHDI.com/HDI2005)



# the networking zone

## HDI Networking & Community Building

*“As a new help desk manager, there is no tool or experience better than the HDI Conference. This is a must for new managers. I had so much fun, got great education, and met people I’ll definitely be keeping in touch with.”*

PHIL O’HARA  
IT SUPPORT SUPERVISOR  
MEDRAD, INC.



### **NEW!!! The No SPLAT! Zone**

**Hosts: Mark Rosenberger and Greg Cortopassi**

The No SPLAT! Zone is HDI’s most innovative and supportive community-building forum and guided networking program ever offered! You’ll discover support from your fellow conference attendees, and learn how to be better supported by the people you count on everyday, all in a fun, idea-packed setting.

It’s the network zone to gather ideas, direction, new perspectives, techniques and strategies for taking conference information and putting it into results-producing action.

Participate in No SPLAT! Zone networking sessions throughout the week. The more you participate, the more value you will gain from the conference experience:

- Round 1: The Conference Optimizer: Setting Up to Win BIG
- Round 2: Afternoon of Discovery: Tools and Tricks to Take Away
- Round 3: The Open Door: Leverage the Experience, participate and learn how to extend the conference experience all year long.
- And join informal “No SPLATS!” during breakfast round table discussions each morning.

The No SPLAT! Zone will help you meet new people who have faced the challenges you’re currently facing; gain new insights and see new possibilities for taking your team to the next performance level.

### **Conference Optimizer**

**Monday, March 7th — 3:10 pm - 3:45 pm**

Open to all conference attendees, but especially recommended for first-timers at the HDI Annual Conference & Expo, take advantage of the most fun “guided tour” through all the events and activities we have planned. Hosted by *No SPLAT! Zone* author, Mark Rosenberger, this welcome session and conference orientation will provide you with an opportunity to meet new friends, highlight what to do, where to go, how to navigate the sessions, and what not to miss throughout the three packed days of education, expo, networking, and fun.

Start your No SPLAT! Zone experience (Round One) at this orientation session! You’ll leave this welcome session with CFFP — Clarity, Focus, Fun, Plan. Get a simple tool to help you network throughout the conference, and make new friends even before the official opening session.

### **Daybreak Discussions & The Story Zone**

Begin each morning with a new discovery at breakfast with a host of round table discussion groups. Choose from informal networking sessions organized by common interests or geography, Vertical Visions discussions for various industries, No SPLAT! Zone round tables for guided networking and idea-sharing, or the ever-popular Daybreak Stories, with HDI’s chief morale officer Kirk Weisler!

### **The Party Zone**

**Monday, March 7th — 5:30 pm - 8:00 pm**

HDI 2005 Welcome Reception — Explore the Discovery Zone, HDI 2005’s Expo Hall, for a fun and relaxing welcome reception. Visit the vendors, enjoy a drink, discover the latest product introductions on The Launch Pad, and meet friends and colleagues!

**Wednesday, March 9th — 7:00 pm - 10:00 pm**

And, don’t miss the HDI 2005 Conference Festivities on Wednesday night, featuring many exciting surprises!

**"HDI is the annual recharging of my motivation and a venue for new tips to take back to our team. I'm proud to be a member of HDI."**

PAULETTE VANDENBRANDE, HELP DESK TEAM LEADER, MERIDIAN HEALTH

# vertical visions & afternoon of discovery

## NEW!!! Vertical Visions

**You asked for it and you got it!**

Vertical Visions provides HDI Conference attendees with an unparalleled opportunity to share skills, knowledge and expertise within your own industry — not only during the few days at the conference, but online before the conference via our new event weblog, "the HDI Buzz Zone," and long after you return home.

Facilitated by seasoned veterans from within each industry, these sessions will spur discussion about issues unique to your type of business. In the Vertical Visions session, the industry host will introduce key issues and trends relevant to each group. The host and Vertical Visions community members will encourage continued networking throughout the event during breakfast and lunch roundtable discussions and informal conversations. Finally, reconvene in the "Open Door" during the last sessions of the week to establish a framework for continuing your group's dialogue year-round and form an action plan packed with ideas that you will take back to your own organizations.

## Afternoon of Discovery

**Back by popular demand!**

Take advantage of this dedicated time for highly interactive workshops and special in-depth group discussions on today's hottest issues. Gather and share ideas you can use, look out into the future to see upcoming trends, ask questions of the experts, and be inspired!

### D1 EXECUTIVE FOCUS

**I/E** Keyword: *Business of Support*

#### The Discoverers — Executive Networking

*Doug Whittle*

Facilitated this year by Doug Whittle, the conversations will be guided through a unique open space model to enhance idea sharing on specific topics you develop and generate action ideas you can implement.

### D2 ISSUES & ANSWERS

**I/E** Keyword: *Process Management*

#### HDI Local Chapter Networking Zone

*Mary Cruse*

Meet in the Discovery Zone with your HDI local chapter members and officers to discover a new view of how your chapter can catapult into the future.

### D3 ISSUES & ANSWERS

**I/E** Keyword: *Global Support*

#### Global Support: Top Five Issues & Answers

*Moderator: Phil Verghis*

In this interactive, unplugged workshop, you'll share opinions, realities, success factors, questions and solutions to the diverse set of global support issues.

### D4 ISSUES & ANSWERS

**I/E** Keyword: *Outsourcing*

#### Outsourcing Unplugged

*Moderator: Kristin Robertson*

Bring your hard questions and get prepared for non-stop discussion about the pros and cons of outsourcing.

### D5 ISSUES & ANSWERS

**I/E** Keyword: *Knowledge/eSupport*

#### Knowledge Management Unplugged

*Moderator: Richard Joslin*

Share opinions, realities, success factors, questions and solutions to the diverse set of knowledge management issues.

### D6 THE HUMAN FACTORS

**I/E** Keyword: *Team Development*

#### The No SPLAT! Zone

*Mark Rosenberger, Greg Cortopassi*

The No-SPLAT Zone is HDI's newest, most innovative community-building forum and guided networking program ever offered! Participate in Round 2: Tools and Tricks to Takeaway, a lively, interactive idea-packed networking experience. You can participate even if you missed Round 1 at the Conference Optimizer.

### D7 ISSUES & ANSWERS

**I/E** Keyword: *Certification*

#### Certifying Your Support Center: An Inside Look

*Moderator: Carrie Higday*

Learn how meeting the HDI SCC global standards helps build the foundation for a quality framework that translates into ROI to benefit customers, employees, and corporate goals.

### D8 THE HUMAN FACTORS

**I/E** Keyword: *Team Development*

#### Whose Management Line Is It Anyway?

*Arthur Coombs, Kirk Weisler*

Get your notebooks and pens at the ready as two HDI favorites face off in a duel of quick wits and motivational management bits.

### D9 ISSUES & ANSWERS

**E** Keyword: *Quality Management*

#### A Six Sigma Workshop: Applied Concepts

*Frederick Van Bennekom*

We will build a product, take measurements, and analyze the data to develop those concepts, fostering a deeper learning of Six Sigma.

### D10 THE TECHNOLOGY ZONE

**I/E** Keyword: *Tool Savvy*

#### SQL Workshop for Help Desk Managers

*Jeff Davis*

You'll learn to write your own SQL commands. Bring your laptops, your questions, and your thinking skills.

### D11 THE TECHNOLOGY ZONE

**I/E** Keyword: *Performance Management*

#### Assembling Key Performance Statistics from Support Magic

*Anthony Krasinski*

You'll learn how to use Crystal Reports to gather statistics that will help managers rate technician performance in the areas of quantity, quality and job knowledge.

## Vertical Visions Sessions

106 - I/E TUESDAY, MARCH 8, 9:45 - 11:00 AM

### Government Customer Support

206 - E - TUESDAY, MARCH 8, 11:15 - 12:30 PM

### The Future of Software Support

*John Custy, Host, JPC Consulting*

306 - I - WEDNESDAY, MARCH 9, 9:45 - 11:00 AM

### Technology Support in Higher Education

*Mark Fitzgerald, Host, Brigham Young University*

405 - I/E - WEDNESDAY, MARCH 9, 3:30 - 4:45 PM

### Banking and Financial Services: Building a World-class Back Office

*Robert Barnes, Host, JP Morgan Chase*

606 - I/E - THURSDAY, MARCH 10, 8:15 - 9:30 AM

706 - I/E - THURSDAY, MARCH 10, 9:45 - 11:00 AM

### The Open Door — Open to All



**Register Today!** 1-800-248-5667 • [www.ThinkHDI.com/HDI2005](http://www.ThinkHDI.com/HDI2005)

# session block 1

Tuesday 9:45 am - 11:00 am

## 101 EXECUTIVE FOCUS

I/E Keywords: Infrastructure Management / Trends & Future Visions

### Change to Win: Viewing IT through a Business Lens

**Brian Bell**, Sr. Director, Remedy Marketing, Service Management Business Unit, BMC Software

Unmanaged changes by IT are responsible for up to 80% of system outages, and even when planned, 20% of changes can cause system failures. It's time to change the way organizations think about change in their IT environments. In this session, review case studies of companies that have tackled change and configuration-related issues, and get tips on how to reduce business and support costs, reduce outages associated with change and turn changes in your IT environment into an advantage.



*Brian Bell has been with Remedy, a part of BMC Software, for three years. Previously, Brian was director of corporate development with Extricity, Inc., where he was responsible for strategic partnerships and acquisitions.*

## 102 EXECUTIVE FOCUS

I/E Keyword: Service Management

### Consolidating Multiple Service Lines

**Ron Hurlle**, Global Contact Center Manager, Intel Corporation

As call centers continue to receive pressure to reduce costs, many companies are compelled to consider help desk consolidation strategies to achieve their business objectives. Ron Hurlle will share some of the experiences of one of Intel's largest call center organizations that is living through functional consolidation of service lines including manufacturing, engineering, human resources and other help desks. He will talk about Intel's plans to leverage business process standardization, technology, infrastructure and resources to further reduce costs and increase our value proposition.



*Ron Hurlle is Intel's global contact center manager for the IT division with a focus on consolidating all contact center activity. Ron was also the director of support services for an educational software company and has been director of operations with an international outsourcing firm.*

## 103 ISSUES AND ANSWERS

I/E Keyword: ITIL

### The Strategic Power Triangle: The Next Generation Service Desk

**Brenda Iniguez**, Director of Business Development, Pink Elephant

Why is the new generation of service desk managers so valuable to today's competitive business? Today's service management leaders are strategic, and understand the value of the strategic power triangle. When one of the triads is missing, there are gaps, and there will be a tangible impact on your organization. This session will teach you the strategic power triangle and the interrelationships among the three key elements: ITIL incident, problem and change management. It will give you the tools to be a new generation service desk manager and the clout to be a "player" in today's business environment.



*Brenda Iniguez has managed systems support in Fortune 500 firms for 23 years. She is chair emeritus of the HDI Member Advisory Board, served on HDI's Strategic Advisory Board, the officers board of the San Francisco HDI Chapter, and the HDI Conference committee.*

## 104 ISSUES & ANSWERS

I/E Keyword: Knowledge Management

### The Knowledge Management Maturity Model

**Richard Joslin**, Senior Consultant, IHS Support Solutions

Have you implemented knowledge management yet? Are you striving for Knowledge-Centered Support<sup>SM</sup>? Many service desk managers will respond, "yes." But what does that mean? Knowledge-centered support (KCS) is a KM methodology developed by the Consortium for Service Innovation, and many companies have successfully adopted this methodology. In this session, you'll learn about the characteristics of a KM methodology and the characteristics of the knowledge management maturity model. Find out how to enhance your knowledge management initiative. And, if you haven't implemented KM yet, this session will aid you in establishing your vision and the requirements for success.



*Rick Joslin provides consulting services related to implementing and enhancing support operations with a key focus on knowledge management and e-service. Rick is an HDI-certified instructor.*

## 105 ISSUES & ANSWERS

I/E Keyword: Change Management

### And Now for Something Completely Different

**Doug Whittle**, Partner, The Diagonal Group, LLC

This session is designed to provide you with tools and exercises that will help you identify the stages of change on a change curve, how to recognize where you are on that curve at any given time and strategies and techniques to move you through the change curve in a positive and energized way. Gain a new sense of confidence and self-awareness as you learn change management techniques in this highly interactive and informative experience.



*Doug Whittle has 20 years of experience managing training, documentation and support programs in a corporate business environment. He has extensive experience in coaching individuals and teams, strategic planning, process and organizational redesign, facilitation, organizational change and communications.*

## 106 ISSUES & ANSWERS

I/E Keyword: Trends & Future Visions

### Vertical Visions: Government Customer Support

In government, our bottom line isn't measured in dollars, but rather in the safety and quality of life of citizens. This interactive session will examine effective and unique ways of addressing the customer support challenge across all levels of government using a wealth of agency examples and featuring approaches successfully utilized by the winners of the Government Customer Support Award to foster teamwork, technical excellence and customer focus.

## "The HDI Conference is a great opportunity to network and gain helpful tips to make your job easier!"

DAWN SPARKS, HELP DESK DISPATCHER, NORTHEAST OHIO REGIONAL SEWER DISTRICT

### 107 THE HUMAN FACTORS

I Keyword: Business of Support

## Building Today's Help Desk

**Katherine Spencer Lee**, Executive Director, RHI Consulting

How has the current economic and business environment impacted today's help desk? Let's examine the issues: staffing benchmarks, staff decompression, hiring strategies, retention and skills development in this emerging context. As you make the case for filling holes created during the downturn, how many support professionals do you need to run your company, and in which IT disciplines should your team members be experts? Katherine Spencer Lee will lead the discussion on these critical issues and more.



*Katherine Spencer Lee has more than 15 years of experience in information technology consulting services. She is a spokesperson, author of industry articles and frequent public speaker on IT staffing.*

### 108 THE HUMAN FACTORS

I/E Keyword: Team Development

## A New Age of Passion from an Old School of Thought

**Art Coombs**, President and CEO, Kombea Corporation

Lessons, legacy and learnings from our founding fathers will illustrate time-honored principles that can have real-world and right-now application to the challenges of communicating vision, increasing levels of commitment and engagement, conflict resolution and more. Lifelong learners will love this session in which the problems of the present and challenges of our contact center future are Art-fully looked at with the wisdom and perspective of the past.



*Before heading up KomBea, Art Coombs served as executive vice president for ICICOneSource. He was CEO and founder of EchoPass Corporation, and served as CEO of Sento Corp, and managing director and vice president, European business development for Sykes Enterprises. Art is also a widely published author of BPO/contact centers, outsourcing and technical support methodologies.*

### 109 THE TECHNOLOGY ZONE

I/E Keyword: Tools Maximization

## Tools Maximization: A Foundation for Success

**Judy Benda**, Executive Director, Training and Certification, HDI

Technology tools are so complex that most users don't use them to their full potential. Judy Benda will present a standards-based process for maximizing the use of support tools. You will learn the specifics about: tool capabilities, TCO, how to assess current usage, how to identify additional functional capabilities, increase usage and maintenance options.



*Judy Benda brings an impressive and diverse background to HDI, including experience as a help desk practitioner, and expertise in the areas of training development, customer service, sales, marketing, project management and process enhancement.*

### 110 THE TECHNOLOGY ZONE

I Keyword: Tools in Action

## Cost Control AND High Customer Satisfaction: The Possible

**Ken Wells**, Group Director, IT Customer Care, Siebel Systems

Discover how Siebel Systems has leveraged its own products, including Siebel IT Service Management and Siebel Analytics, to improve the quality of internal and external IT support while reducing support costs. Learn about best practices that enable Siebel IT to deliver preemptive support, how to encourage and drive employee self-service, how to provide enhanced assisted support via a consolidated support portal and how to address emerging support trends and incidents.



*Ken Wells has been in the electronics and communication industry for more than 22 years, with a 18 years of experience in end user support and service. For Siebel Systems, Ken is a key contributor in building a world class IT organization to provide technology products and services to 5,600 Siebel employees worldwide.*

### 111 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Process Management

## Real HD: Mapping Out Help Desk Processes

**Julie Mohr**, Managing Consultant, Alternative Resources Corporation

This highly interactive session will look at an actual help desk and show you how to develop cross-functional processes that define the process, roles and responsibilities, metrics and all customer interaction points. We will evaluate actual process flows in detail and discuss how to create them for your own support environment. Although this is a topic for new managers, support veterans will also benefit from redesigning their processes using more advanced techniques.



*Julie Mohr has 14 years of experience in the IT industry. She speaks frequently at industry conferences, and publishes articles on best practices. She is the author of The Help Desk Audit: Blueprint for Success.*

### 112 EXECUTIVE FOCUS

I/E Keyword: Service Management

## Discoveries in Depth: SLM — The Cornerstone of Process Maturity (Part 1)

**Char LaBounty**, President, LaBounty and Associates, Inc.

IT managers need proven tools and methodologies that help drive operations toward the elusive goal of alignment. The use of service level management can help to achieve and maintain critical IT business alignment in a complex environment of ongoing business and IT change. It is a critical cornerstone for implementing process maturity in the other core process disciplines. This part of the workshop provides the conceptual and strategic foundation for SLM. Part Two provides the practical application of SLM as implemented by EarthLink.



*Char LaBounty has 20+ years of executive leadership experience in the technology service and support industry, directing IT support for organizations including Norwest Corporation and Disney Worldwide Services, as well as serving as the director of membership services for HDI. She is the past chairperson of the HDI Strategic Advisory Board.*

# session block 2

Tuesday 11:15 am - 12:30 pm

## 201 EXECUTIVE FOCUS

I/E Keyword: Business of Support

### Don't Gamble with Your Future

**Greg Oxton**, Executive Director, Consortium for Service Innovation

This session will change the focus on support from a cost-focused discussion to a value-creation discussion, and define the "Funnel to the Cloud" model for thinking about the support function as creating value for end users and customers, as well as for the business overall. We will explore the current state of support structures and processes, "the funnel," and describe a way to think about the future state, "the cloud," as organizations evolve their structures and processes. Understanding this model provides insight on what to expect and how to prepare for a knowledge-based support environment.



*Greg Oxton has extensive experience in the support business. Through his work with Consortium members, he has helped develop insight into Knowledge-Centered Support (KCS) principles and the process of adoption.*

## 202 EXECUTIVE FOCUS

E Keyword: Trends & Future Visions

### Blindsided!

**Jim Harris**, Author

Can a business appear healthy and yet actually be dead? In 2001 Polaroid declared bankruptcy. The company that defined instant photography was blindsided by the rapid rise of digital photography. While it took TV 10 years to attract 10 million users, it took Netscape 28 months, Hotmail 18 months, and Napster only 9 months. Drawing from his book, *Blindsided!*, Jim Harris will discuss why companies and whole industries are being blindsided, and examine: How to identify early warning signs? How can you put systems and structures in place that will prevent their organizations from being blindsided? And, how can you blindsided your competition?



*Jim Harris is a leading author and thinker on change and leadership. As a consultant, Jim speaks extensively and conducts strategic planning sessions with executive teams. His new book, *Blindsided!* is a #1 international bestseller.*

## 203 ISSUES & ANSWERS

I Keyword: ITIL

### Support Behind the Club

**Marty Woodford**, Manager, Network Operations, TaylorMade-adidas Golf Company

TaylorMade-adidas Golf Company has embarked on an extensive continuous improvement program, with ITIL as a key driver. In this fun, golf-themed session, you will learn how TmaG went from rudimentary help desk to customer-focused service desk. This session will demonstrate the benefits of the ITIL implementation at TmaG. Competent control and management of the IT Infrastructure is now a statutory requirement to comply with Sarbanes Oxley. ITIL is the global "de facto" standard for service management and the foundation of the ISO variant BS 15000.



*Marty Woodford oversees the global infrastructure for Taylor Made-adidas Golf. He has 13 years of experience in the IT industry in both the enterprise and consulting on infrastructure and support issues. He holds many industry certifications including: ITIL Foundations, Microsoft Certified Systems Engineer (MCSE), and Cisco Certified Network Associate (CCNA).*

## 204 ISSUES & ANSWERS

I/E Keyword: Process Management

### Maintaining Data Integrity at the Help Desk

**Jeffrey Battaglino**, Help Desk Manager, Commerce Bancorp.

This session will cover the methodology behind attaining a higher level of data integrity within help desk systems. The presentation will outline five key indicators that can raise the effectiveness of any help desk: validity, quality, flexibility, mobility and continuity. The session will detail the characteristics of each indicator and provide specific examples and recommendations on how to implement them into a help desk routine. It will also outline specific help desk features that can be implemented into many out-of-the-box products on the market today, to aid in assisting help desks in attaining a higher level of data integrity.



*Jeff Battaglino has been in the IT field for 16 years, holding positions in operations, help desk, technical support and training, and has held management positions and staff positions in each of these areas.*

## 205 ISSUES & ANSWERS

I/E Keyword: Performance Management

### Sustaining Change in a Change Resistant Environment

**Mark Rosenberger**, Certified Speaking Professional

If change is the only constant in your organization, then crafting a new vision for change is essential. In this fast paced, idea-packed session, you'll discover the elements that make or break any change initiative-from major cultural reforms to process and procedure shifts. You'll learn how to create rapid buy-in and lower resistance to change. identify pitfalls, how to craft a change vision so everyone is on board, the art of keeping your team focused on what's possible and how to thrive during the change effort.



*Mark Rosenberger is the author of The No SPLAT! Zone, sequel to The Trapeze Buddy Success Strategy, as well as other books and a leading tape series, "Trapeze Buddies." Mark is a frequent conference speaker and consistently scores high marks for content, insights, application, delivery and contagious enthusiasm.*

## 206 ISSUES & ANSWERS

E Keyword: Trends & Future Visions

### Vertical Vision: The Future of Software Support

**John Custy**, Principal, JPC Consulting

Software support is more than just responding to customer questions. The software support organization today must add value and be a business partner. But what does this really mean? How can you balance the customer's need for service with the profitability of the support center? In this session, you will explore practices of successful support organizations that are evolving to this level of maturity. Learn how best practices, benchmarking and base-lining can help drive a business-centric support center and look at the differences among SCC, COPC, TQM, Six-Sigma, CMMI, ITIL, BS15000, ISEB, ISO, itSMF, COBIT and COPC.



*John Custy has more than 20 years of experience working in the technical support environment. He has been a key contributor in the development of a number of industry certification programs. John is a co-author of the paper "Customer Oriented Enterprise Integration Technology." John is an HDI-certified instructor.*

**“This conference has given me new tools as a manager that I hadn’t received anywhere else!”**

STEPHANIE O’CONNOR, DIRECTOR, IT SUPPORT CENTER, CITY UTILITIES OF SPRINGFIELD

## 207 THE HUMAN FACTORS

E Keyword: Customer Service

### Go Ahead. Don’t Train Your People

Tim Nelson, President, Brown Bag Training

Education is expensive, but not as expensive as ignorance. Training is an investment. But it’s your choice. Either way, you’re going to pay. This fast-paced, hard-hitting talk will take you “off the fence” about investing in training. It will cover facts about the real costs of not training. You’ll learn the different types and methods of training and come away with a new appreciation for helping your people improve. This is a “must see” for executives who manage any sort of service business and are searching for a competitive edge.



*Tim Nelson is a business leader and an expert in the field of team-building, call centers, customer service and training. He teaches business and ethics at two colleges in New York, and is president of Brown Bag Training.*

## 208 THE HUMAN FACTORS

I/E Keyword: Team Development

### “No Excuse!” Teaming: Implementing Self-responsible Work Teams

Jay Riftenbary, CEO, Riftenbary Training & Development Center

You’re probably familiar with “No Excuse!” the hard hitting, no nonsense approach to personal responsibility as dynamically conceived and presented by Jay Riftenbary. He brings that same principle to team development as he leads the way for you to implement self-responsible work teams. Learn the key elements of effective team building, how to enhance leadership skills in team members and their managers, how to transfer individual self-responsibility to team self-responsibility, and much more.



*Jay Riftenbary is president of the Riftenbary Training & Development Center, and author of the International Best-seller, No Excuse! - Key Principles for Balancing Life & Achieving Success, awarded “Book of the Year” by the North American Book Dealers Exchange.*

## 209 THE TECHNOLOGY ZONE

I/E Keywords: Infrastructure Management / Tools Maximization

### Maximizing the Support Tools Infrastructure

Mike Devaney, Director of Technical Services, CompuCom Systems, Inc.

Learn the best practices for maximizing your ability to serve clients through the customization of systems. This session will review the challenges inherent in the deployment, administration, and utilization of major help desk systems. It will discuss best practices, tips and techniques used by a major help desk outsourcer, CompuCom Systems, to maximize both operational efficiency and customer satisfaction. Systems covered include phone management, problem management, workforce management, knowledge management, and reporting. It will also address integrating these systems with self-help/e-Support functionality.



*Michael Devaney is responsible for the tools and technology in use by agents and clients. He has more than 20 years experience in computer service and support.*

## 210 THE TECHNOLOGY ZONE

E Keywords: Customer Service / Tools in Actions

### Project Genesis: Optimizing Customer Service Across All Channels

Kenny Bunnell, Program Manager, Novell

Novell will share its strategy for world-class support, a comprehensive initiative to deepen customer interactions while attaining greater process and infrastructure efficiency. Kenny will share successes in creating a common, consistent support infrastructure to optimize service across service channels. By integrating knowledge access and streamlining support processes, Novell is able to develop consistent interactions between customers at all levels of support, bring customers to the best resources available for each specific issue and gain continuous insights into product and service improvement opportunities. The tools, methodology and feedback process necessary to deliver and sustain these improvements will also be discussed.



*Kenny Bunnell oversees the investigation, selection, and deployment of new technologies for enhanced support delivery for Novell Technical Services worldwide. He has more than 10 years of high tech experience, and has held positions in support management, outsourcing, system administration, and eSupport.*

## 211 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Process Management

### Developing an Effective Support Structure

Kristin Robertson, President, KR Consulting, Inc.

Are you delivering support effectively and efficiently? The structure of your support center enables you to provide outstanding customer support. Developing the best processes for your unique situation makes the difference. We’ll look at: how to handle incoming customer contacts, creating effective escalation procedures using operating level agreements, the best way to calculate needed headcount and developing a career ladder and team structure that facilitates providing outstanding technical support. You’ll come away with a spreadsheet to calculate needed headcount in your support center and an operating level agreement template. Your support center will be running like a top after this session!



*Kristin E. Robertson helps support centers increase their customer satisfaction and improve their efficiency. As a consultant and trainer, she has assisted leading companies with their help desk and technical support needs. She is an HDI Authorized Training Partner.*

## 212 EXECUTIVE FOCUS

E Keyword: Service Management

### Discoveries in Depth: SLM — Implementing SLM in a High Tech Company (Part 2)

Peggy Gerace-Roosa, Director of Service Level and Process Management, Willa Fabian, Vice-President of Network and Data Center Operations, EarthLink, Inc.

At EarthLink IT doesn’t just serve the business: it is the business. The entire company infrastructure provides Internet-related services to more than 5 million subscribers, and the majority of operations staff is dedicated to the support, maintenance, and growth of these systems. Service level management was the prerequisite of a journey of EarthLink embracing process maturity at the system management level, change and release management, and security management. During this session, participants will have a chance to learn the details behind the implementation of SLM at EarthLink.



*Peggy Gerace-Roosa is a freelance writer and a frequent guest speaker at national technical communications and project management conferences. Willa Fabian has created cohesive, accountable, enterprise teams that address improved service levels, systems life cycle practices, and quality metrics.*

# session block 3

Wednesday 9:45 am - 11:00 am

## 301 EXECUTIVE FOCUS

I Keyword: Global Support

### Transforming into a Global IT Service Organization

**Christof Recknagel**, Global IT Service Director, Boston Consulting Group

Discover how a global service corporation with 60 locally-focused on-site help desks transformed its IT into a global service organization. Experience how a three-tier IT service organization can help to improve IT service quality and competitiveness, boost efficiency, and allow for greater flexibility and pro-active management. Prepare for the obstacles you will encounter when you plan and implement such a drastic change, and how can you do it in an evolutionary approach.



With 18 years experience in the IT industry, Christof Recknagel has led and reshaped IT teams in Europe, Australia and the Americas and provided leadership for numerous global IT projects in the IT service.

## 302 EXECUTIVE FOCUS

E Keyword: Customer Service

### Making Support the Competitive Differentiator

**Lala Mamedov**, Director, Technical Support Operations, VeriSign  
**Claire Gribbon**, Vice President, Global Customer Advocacy, Primus

The enhancement that support organizations can provide to businesses' relationships with their customers is beginning to be recognized. The future of the support executive's role is to move beyond focusing on customer relationships to influencing overall enterprise strategy. Support is a natural competitive differentiator as it is integrally tied to the product and the customer's experience of the product. Participants will gain a vision of the future in this presentation that will use real-world examples of VeriSign's and Primus' successful beginning of shifting to business-centric support.



**Lala Mamedov** manages a large 24x7 support organization, providing multi-tier service to the online merchants using VeriSign Payments Services. She is a seasoned support professional with more than 10 years of support management experience, ranging from delivering frontline support to building backline and sustaining support operations. **Claire Gribbon** is responsible for customer technical support, IS help desk and product quality assurance for Primus Knowledge Solutions.

## 303 ISSUES & ANSWERS

I Keyword: Customer Service

### We Are Aware and We Care: Implementing Customer Care at Blue Cross Blue Shield

**Anna Guy**, Help Desk Manager, Blue Cross and Blue Shield of Florida, Inc.

In this customer centric age, value-added services are not only desired, they are a must. This session will assist you in marketing, developing and implementing a customer care program. Anna will share specific how-to's about how her organization implemented this customer care program, following ITIL service management principles, by highlighting the mission statement, goals and focus, tasks, and steps taken to develop the program.



Anna Guy has been with Blue Cross and Blue Shield of Florida, Inc. for 30 years. Under Anna's leadership, the help desk went from a mainframe centric service provider with eight employees to a multi-platform support center with 45 employees. She is an HDI Certified Help Desk Manager and the founding president of the HDI First Coast Local Chapter in Jacksonville, Florida.

## 304 ISSUES & ANSWERS

I/E Keyword: Problem Management

### Disaster Recovery for the Support Center

**Jeff Davis**, Technology Columnist and Consultant, TheJeffDavis.com

The top liaison with SunGard, the monolith for the disaster recovery hotsite industry, Jeff Davis, will explain the help desk's role enterprise-wide disaster recovery planning and how to comply with the Sarbanes-Oxley Act. Using a template specially designed for help desk teams, you'll learn how to write the help desk team plan from scratch and discuss best practices for testing and maintaining the plan. The goal is to provide enough information so that the attendees, who have no written help desk team plan, can return to their companies and kick-start the process of getting a plan written.



As a freelance technology consultant, Jeff Davis provides on-call help desk support and helps companies establish call center policies and procedures. Jeff is also a technical writer who has published more than 1,200 technical how-to and career-related articles.

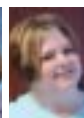
## 305 ISSUES & ANSWERS

E Keyword: Change Management

### Quality-based Performance: Changing the Culture

**Dawn Roussey**, Prgm Mgmt Advisor, WRO Revenue Services, FedEx  
**Jeni McCreary**, Senior Manager, WRO Revenue Services, FedEx

What sets an organization apart from its competitor? How can it retain and expand its customer base? What makes it attractive to customers? How can its internal culture adapt and embrace change? More than ever before, organizations need to create processes, communication strategies and operational change elements that will make them stand out from their competition. Hear how FedEx integrated quality-based management practices into its service workgroup. Dawn Roussey and Jeni McCreary of FedEx will discuss how they are managing the transition and sustaining the change to increase profitability and service satisfaction.



**Dawn Roussey** is responsible for implementation of strategic programs, communication, large projects and corporate initiatives within her department. **Jeni McCreary** is responsible for a revenue center that includes an on-site call center vendor, and a FedEx exempt analyst sales support staff.

## 306 ISSUES & ANSWERS

I Keyword: Trends & Future Visions

### Vertical Visions: Technology Support in Higher Education

**Mark Fitzgerald**, Help Desk Manager, Employee Technologies, Brigham Young University

University help desks face a unique set of challenges from serving as ISP support to residential facilities, business support to administration, research support to faculty, all while maintaining a high level of proficiency in every system under the sun. This session will discuss the details of running a technical IT desk in a higher education setting and analyze how industry standards can be combined with the unique set of university resources to produce a superior help desk.



Mark Fitzgerald has worked on starting three separate technical help desks in his seven years with the university; each of these help desks brought a different type of training program ranging from boot camps, testing and certification, and weekly classes. Mark has been managing the training program for desktop technologies for several years.

**"I've attended many conferences, but HDI is always the most beneficial."**

TED AMMANN, TECHNOLOGY MANAGER, RED CLAY SCHOOL DISTRICT

### 307 THE HUMAN FACTORS

I/E Keyword: Personal Development

## Can You Hear Me Now?

**Joel Ramseyer**, *Founding Partner, The Diagonal Group, LLC*

In this fun and interactive session, learn a model for understanding the different styles we all use to communicate with each other. This session will help you, as the communicator, adapt and connect your communication efforts to match the style and needs of the individual(s) with whom you are communicating. Review the five primary communication channels you can use to communicate with others and explore ways to use those channels more effectively.



*Joel Ramseyer focuses on helping clients understand and manage the cultural and organizational impact of their customer service initiatives. Joel works with companies from Fortune 500 to dotcom start-ups focusing on customer service call centers, field sales force teams, internal technology support organizations, and business alliance groups. Joel is a past member of the HDI Strategic Advisory Board, and is currently an adjunct instructor with the Wharton Small Business Development Center.*

### 308 THE HUMAN FACTORS

I/E Keyword: Personal Development

## Discovering the Heart, Mind and Soul of EXTREME Leadership

**Dave Timmons**, *Speaker, Author, Songwriter, Extreme Leadership Solutions*

As a progressive leader in customer service, can you inspire anyone, anytime to achieve breakthrough results? Would you like to know the biggest mistake every leader/coach makes? Would you like to be known as a great leader in your call center? By understanding the heart, mind, and soul of EXTREME leadership, you will discover your personal courage to go from good to great! In this interactive session, your learning experience will be packed with content, music, inspiration, and fun as you gain a new perspective to become an EXTREME leader!



*Dave Timmons is a leadership growth expert with proficiency in sales, customer service, business and personal growth. Dave is co-author of Magnetic Leadership® and Fantastic Customer Service Inside and Out.*

### 309 THE TECHNOLOGY ZONE

I Keywords: Service Management / Tools Maximization

## Getting on the IT Service Management Bandwagon Isn't As Scary As You Think

**Russell McGowan**, *Senior Manager, TD Bank Financial Group*  
**Robert Stroud**, *Director, Computer Associates International*

The rapid evolution of information technology places tremendous pressure on IT to deliver services in a structured, cost-efficient, yet dynamic manner and has led to the emergence of IT service management. The speakers will discuss how the companies implemented automated cost allocation and chargeback for distributed services. In this session, you will review best practices for setting accurate service charges and discuss ways to implement an actual versus budgeted spending reporting.



*Russell McGowan is responsible for the initiation and maturity development of the service level management. Robert Stroud spent 15 years in various positions with the Commonwealth Banking Group in Australia and was involved in the development, design and implementation of service management disciplines.*

### 310 THE TECHNOLOGY ZONE

I/E Keyword: Customer Service

## Self Service Effectiveness: It's All About the Users

**David Kay**, *Principal, DB Kay & Associates*

Self service is a good idea for both enterprise and customer-facing support. HDI members report it's their most popular initiative. But success can be elusive. This session shows the practices that leaders use to build self-help sites that are effective because they reflect users' needs and points of view. It presents simple steps to develop, test, and continuously improve self-service sites, and it uses fun examples of real websites-good and bad-to reinforce key learnings.



*David Kay advises support organizations and the vendors who serve them, on self service, knowledge management, and peer support communities. David is an HDI-certified Authorized Training Partner for Help Desk Manager (HDM) and Knowledge-Centered Support (KCS).*

### 311 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Tools Maximization

## Tool Selection 101

**Jennifer Streitwieser**, *Partner, The Diagonal Group, LLC*

If you're looking for direction on successfully buying technology, this session is for you! Learn a structured approach for selecting tools for your support organization. You'll learn how to get started, define your needs, research tools, structure an RFP, evaluate vendors and make the selection. You'll also learn what not to do when selecting a tool, and what to do after you've made the selection. If you're preparing to make a multi-year investment, invest your time in this session to ensure the right tool selection the first time.



*Jennifer Streitwieser has extensive experience in designing, planning, and implementing customer-focused service organizations. She brings 14 years of management and consulting experience to The Diagonal Group, and her background in technology and marketing enables her to help clients develop complete solutions that encompass sales, service and support.*

### 312 ISSUES & ANSWERS

I/E Keyword: Process Management

## Discoveries in Depth: Building a Grassroots Continual Improvement Program (Part 1)

**David Northcutt**, *Senior Technical Staff, IBM Global Services*

Everyone agrees that quality is important, but creating a quality mentality across a large organization seems like a Herculean task. In this two-part session, David will share techniques he has used to develop a continual improvement program in his organization. You will learn what works, the results you can expect, and the difficulties you may encounter along the way. Part one of this workshop addresses the conceptual and strategic foundation for a continual improvement program. Part two provides the tools, techniques and processes for achieving continual improvement success.



*Dave Northcutt started the continual improvement movement in IBM Global Services' help desk area over seven years ago, and currently leads the effort across North America. His leadership in this area has resulted in improved customer satisfaction, improved profitability, and a heightened awareness of the role of continual improvement in a successful organization.*

# session block 4

Wednesday 11:15 am - 12:30 pm

## 401 EXECUTIVE FOCUS

I/E Keyword: Business of Support

### Understanding the Business-within-the-business

Dean Meyer, President, NDMA

You've got great people, but the organization isn't performing to your satisfaction. What's going on? Too often, the organization gets in the way of people's success. The design of an organization may put people in untenable situations, create unreasonable demands, encourage bureaucracy, or even pit people against one another. This session defines the Business-within-the-Business (BWB) paradigm, explores its implications, and suggests a practical way to implement it.



Dean Meyer has dedicated his career to the systematic design of high-performance organizations. His thinking and experience are captured in six books, detailed handbooks and research studies, a series of executive monographs, numerous magazine articles, as well as ongoing executive seminars and participative consulting processes.

## 402 EXECUTIVE FOCUS

I/E Keyword: Infrastructure Management

### Does ITIL Make the Service Desk More Important?

Malcolm Fry, Executive Consultant, Remedy

Does ITIL make the service desk more important? You bet! In too many organizations the service desk is an isolated resource operating from an island that not only has no bridges, but is surrounded by sharks just waiting to take a bite. Many service desks do a great job in isolation, but imagine how much better a job they could do if they could depend on second level support groups. Find out here how to become a key player in service management and ITIL.



Malcolm Fry is recognized as one of the world's foremost authorities on the help desk and IT service management industry. He is the author of four best-selling books on IT service and support, and has had many articles and papers published in multiple languages.

## 403 ISSUES & ANSWERS

I Keyword: Outsourcing

### Making Co-sourcing Work at Ford Motor Co.

Kevin Blackmore, Process Manager, Ford Motor Company  
Tami Schultz, Global Account Manager, TechTeam Global

Take one million tech support calls a year from 140,000 end users, on 1,300 applications, in three languages. Add two partners, and "bake" for 20+ years and you have a recipe for co-sourcing success. Ford Motor Co. and TechTeam Global have mastered the co-sourcing relationship with their Single-Point-of-Contact (SPOC) service model. Discover the four key concepts to global co-sourcing, and take home working models that you can modify and apply to your own co-sourcing relationship.



Kevin Blackmore is responsible for implementing ITIL-based support processes. He has been involved with help desk management for 15 years. Tami Schultz manages the global, \$50 million IT support and client care business for Ford Motor Co.

## 404 ISSUES & ANSWERS

E Keyword: Customer Service

### Leveraging Virtual Call Center Teams to Improve Service Delivery

Georgeann Beville, Director, Worldwide Customer Support, BMC Software

Delivering customer support doesn't stop at the call center. Analysts may call on other departments for information. However, many departments aren't in a position to support customer demands. With the right well-designed, managed and monitored business processes, you can create a virtual customer service organization. Learn how BMC Software's worldwide service organization built accountable business processes that tie these various functions to the customer support center so that you can deliver better service to your customers without overtaxing the existing staff.



Georgeann Beville is responsible for six support centers worldwide and her extensive technical background has led the way to innovative technology solutions that have made it easy for many customers to transition to online issue resolution with confidence. She is committed to performance improvement training for her employees worldwide.

## 405 ISSUES & ANSWERS

I/E Keyword: Process Management

### Vertical Visions: Banking and Financial Services — Building a World-class Back Office

Robert Barnes, Senior Vice President, Global Service Desk, J.P. Morgan Chase

This session will discuss how to create a world-class back office to support your help desk, while holding unit costs down. The session will cover the functions of key personnel and ratios, and teach you how to sell this model to senior management and calculate the expected ROI. You'll discover the myths about back office support costs and discuss common industry failures you can avoid when trying to design a successful support team.



Bob Barnes has been in IT for more than 15 years and has managed help desks in the government, pharmaceutical, manufacturing, telecommunications and financial industries. He has managed in-house help desks, and he has also worked for a tier one outsourcing corporation managing its large IT outsourcing/managed services contracts.

## 406 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keywords: Business of Support

### How to Market the Value of Your Support

Paul Dooley, President, Optimal Connections

Does your management fail to realize the value your support center is contributing to the enterprise? Do you find that customers don't appreciate the value you are delivering to their business? Are you experiencing ever-increasing budget pressure, lack of attention from top management and little support for proposals and new projects? This presentation will teach you how to market the value of support. We'll discuss how to think as the support organization as a business-within-a-business, write a solid business and marketing plan, develop proven tools and collateral to support that plan and how to put your plan into action.



With 30 years in the high tech services and support industry, Paul Dooley has held a range of positions from front-line support to management. His experience includes multiple support center integration, management of large-scale help desk system installations, service/support collateral development, policies and procedures, product/service development and service/support marketing.

**“A superb and well-organized conference.  
Extremely useful and informative.”**

KEITH BOSWELL, CLIENT SERVICES MANAGER, NETWORK AND CLIENT SERVICES, N. CAROLINA STATE UNIVERSITY

#### 407 THE HUMAN FACTORS

I/E Keyword: Performance Management

### Workforce Morale in a Global Service Environment

**Darin Vandecar**, Operations Manager, Global Support Center, Intel Corporation

Buoying employee morale in a globally or geographically dispersed support organization is difficult. This session will explore a wide range of activities and programs that were implemented within one large service desk environment to successfully improve morale and increase agent productivity. Some examples will include: breaking down cultural and regional boundaries, getting employees involved in the continuous improvement process, improving work-life balance, enhancing career development and building globally consistent recognition programs.



*Darin Vandecar is responsible for managing help desk support for Intel's IT department. As part of the global contact center management team, Darin is heavily involved in the planning, development and implementation of Intel's (internal) global support structure.*

#### 408 THE HUMAN FACTORS

I/E Keyword: Team Development

### Intentional Service

**Greg Cortopassi**, Founder, Launch Your Dreams

At best, few organizations have been successful integrating the formation of their vision, mission and values into their strategic goals and daily service operations. The missing link is clarifying and transferring these powerful guidelines into daily Intentions. Intentions are the fundamental reason behind any strategy, decision and behavior. Intentions are the process of aligning yourself and your team in thought, word and action with your desired results. This session will give you practical strategies to apply the power of intentions to improve the overall quality of individual and organizational service performance.



*Greg Cortopassi has been a leader in personal and professional development for more than 20 years. He has extensive training/speaking experience, and has been instrumental in creating maximum results for an impressive group of Fortune 500 clients.*

#### 409 THE TECHNOLOGY ZONE

I Keyword: Tool Savvy

### Networking 101 for Non-technical Support Professionals

**Todd Lammler**, CEO, GlobalNet Training, Inc.

Routers, switches, hubs, gigabit this, megabyte that — what's the difference? There are so many technical terms thrown around these days that it's hard to keep track. Also, what exactly is the Internet, and what should you expect from it in the future? Come to this introduction to networking session, and learn the foundational principles about networks, the terms used and how it all fits together to keep your life (and business) running smoothly.



*Todd Lammler has been involved in computers and networking with Fortune 500 companies for more than 20 years. Todd's professional certifications include CCNA/CCDA, CCNP, FCC Licensed, CWGSS, and CWLDS.*

#### 410 THE TECHNOLOGY ZONE

I/E Keywords: Tools in Action / Knowledge Management

### Knowledge-powered Support

**Beth-Anne Dancause**, IS Customer Service, Northeastern University  
**Scott Schwartzman**, Chief Operating Officer, ServiceWare Technologies, Inc.

Building an adaptive, knowledge-powered organization depends on a strong and focused implementation of technology, process and best practices. Get an insider's view on how to integrate knowledge management systems to support ITIL and KCS initiatives. Learn how KM enhances Northeastern University's incident management and call tracking initiatives and find out the methodology and metrics behind its knowledge management implementation. The session will focus on the guiding principles for adaptive knowledge management and how to build a strategy for ensuring your organization's long-term success.



*Beth-Anne Dancause is responsible for project scheduling, tracking problem management, analysis, customer satisfaction surveys and communication for a portfolio of customer service projects. Scott Schwartzman is responsible for the planning and execution of major strategic initiatives, including expediting product releases, working with customers and maintaining a services organization focused on complete customer satisfaction.*

#### 411 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Process Management

### Troubleshooting 101: Effective Information Gathering Techniques

**Martha Lundgren**, Department Director, Information Center, Texas Association of School Boards

Great technical support analysts and leading journalists have at least one critical thing in common—they know the right questions to ask. In this train-the-trainer session, you will learn how to use five key questions to provide structure to your troubleshooting, how to solve challenging problems more quickly and confidently, and establish greater credibility and a better working relationship with your customers and your Tier 2 and 3 colleagues.



*Martha Lundgren and her team are responsible for all hardware and software purchasing, installation, support and training for 450 staff members. Martha has more than 20 years of direct customer service, training and technical support experience in the hotel, airline and consumer electronics industries.*

#### 412 ISSUES & ANSWERS

E Keyword: Process Management

### Discoveries in Depth: Continual Improvement Techniques for Customer Service Professionals (Part 2)

**David Northcutt**, Senior Technical Staff, IBM Global Services

Are you frustrated because your data don't seem to help you control and improve your business? Learn how many of the traditional methods of analysis lead to improper conclusions, bad decisions and wasted effort, and discover proven tools and techniques to drive improvements. Part 2 of this workshop provides the tools, techniques and processes for achieving continual improvement success. (Part 1 is not a pre-requisite, but it is beneficial for establishing the foundation.)



*Dave Northcutt started the continual improvement movement in IBM Global Services' help desk area seven years ago, and currently leads the effort across North America. His leadership in this area has resulted in improved customer satisfaction, improved profitability and a heightened awareness of the role of continual improvement in a successful organization.*

# session block 5

Wednesday 3:30 pm - 4:45 pm

## 501 EXECUTIVE FOCUS

I Keyword: Business of Support

### Help Desk TCO: Revealing Best Practices

**Steve Cain**, Vice President, ITIM, Gartner  
**Chris Farver**, Solutions Architect, ARC

If you want to better understand the total cost of ownership for your help desk, or are trying to prioritize where best to spend those ever tightening dollars, this session is for you. Gain insights gleaned from the extensive Gartner help desk database to your support organization perform better. We will establish the costs and benefits for common practices, technologies and channels, and help you determine which ones make sense in your environment.



**Steve Cain** has 19 years of experience in the IT industry and is responsible for the team developing the intellectual capital used in benchmark studies for all areas of IT at Gartner Consulting. **Chris Farver** has more than 20 years of experience in the IT industry, having spent many years as a hands-on practitioner progressing to providing senior level consulting for many small, medium and large organizations.

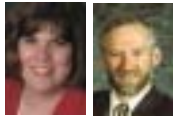
## 502 EXECUTIVE FOCUS

I Keyword: Outsourcing

### Outsourcing IT Infrastructure Support with Virtual Teams

**Theresa Tolkinen**, Manager, End-user Services, ING US Financial Services  
**David Fletcher**, Project Strategist, IBM Global Services

Learn how ING partnered with an outsourcing leader and successfully transitioned a large portion of its IT infrastructure and support services, including help desk operations in just 90 days. Learn how this three-site virtual help desk team, handling 13,000 calls per month, accomplished the transition and how they manage the company/vendor relationship today.



**Theresa Tolkinen** has been a key stakeholder responsible for leading her team through a major outsourcing project and continues to work with her new outsourcing partner in a customer liaison and internal strategic consulting role. **Dave Fletcher** has more than 20 years industry experience, and is currently a project strategist with a IBM Global Services where he uses his background in help desks, training, computer support, and organizational development to implement strategies for building asset management tools.

## 503 ISSUES & ANSWERS

I Keyword: Security

### Security Issues and the Service Desk

**George Spalding**, Executive Consultant, Pink Elephant

Just a few years back SPAM was clogging our arteries, not our networks. Security concerns are a daily — and sometimes hourly — reminder that we are all connected to a worldwide network and that not everyone is a good guy. The first line of defense against malicious incidents is the help desk. In this session, we will discuss the security policies, specific behaviors and products that will empower the help desk to make a difference on the security front.



For more than 25 years, **George Spalding** has been helping individuals around the world realize their full potential by simplifying the complex topics and inspiring people to acquire new skills. He was on the faculty of Yale University, consulted for the White House, and has coordinated technical presentations for members of the president's cabinet, the Smithsonian, the NIH and the FBI.

## 504 ISSUES & ANSWERS

E Keyword: Performance Management

### In the Customer's Eye: Measuring Service Effectiveness

**Frederick Van Bennekom**, Principal, Great Brook Consulting

Service organizations have two broad objectives: applying resources efficiently and being effective in the eyes of the customer. Understanding the quality of service as viewed by the customer is key to long-term customer loyalty and organizational success. This session will outline the various means for a call center to measure effectiveness, which provides the balance in the balanced scorecard. Topics covered will range from surveying customers and other research techniques to internal attempts at measuring service quality.



**Fred Van Bennekom**, Ph.D has authored many surveys used by support service organizations for service program development and quality control purposes. Fred has an expertise in the use of the new breed of electronic survey software tools, and authored Customer Surveying: A Guidebook for Support Service Managers.

## 505 ISSUES & ANSWERS

I/E Keyword: Process Management

### Project Management for Help Desk Professionals

**Ric Mims**, Vice President, Operations, Global Help Desk Services, Inc.

Support center managers are tasked with managing migrations, implementations and scheduled rollouts. This session is designed to prepare support center managers with the skills necessary to guide a project to completion successfully. We will build an awareness of the pitfalls of a project in order to aid you in mitigating risk. You will receive a roadmap to engage projects and some tools and techniques to use on a daily basis.



**Ric Mims** has more than 13 years of experience in help desk management, consulting and operations. He is an HDI-certified instructor, and holds the HDI CSS, HDA, HDSA and HDM certifications. He has also holds a Master's Certificate from the Project Management Institute.

## 506 ISSUES & ANSWERS

E Keyword: Customer Service

### Seven Rules for Mission-critical Support

**Arun Shukla**, Practice Leader, Kepner-Tregoe, Inc.

Business as usual is not a wise business strategy, especially at the point where customers meet your organization. Learn practical ways to increase resolution rate and employee retention rates with a three-pronged approach to customer service. Discover the seven critical rules and best practices of top companies that lead to high performance service teams and greater customer satisfaction.



**Arun Shukla's** expertise extends to the areas of customer service and support, process coaching and skill development, performance system redesign and cost management. As a member of the customer support practice, he has special expertise in improving customer support at IT companies such as Cisco, HP/Compaq, Microsoft, Nikon Precision, Nortel, Novellus and Sun Microsystems.

**“The conference provided a wealth of information and opportunities to explore! I can’t wait to get started.”**

MARIANNE OVERS, DIRECTOR, CUSTOMER SUPPORT, SABRE AIRLINE SOLUTIONS

#### 507 THE HUMAN FACTORS

I/E Keyword: Team Development

### Successfully Managing a Multigenerational Workforce

**Dianne Durkin**, *President and Founder, Loyalty Factor, LLC*

Each generation in the workplace today has different values, needs and work ethics. These differences can make it challenging for managers to understand how to motivate employees from different age groups to increase productivity. This presentation provides information about the different generations that coexist in the workplace today—veterans, baby boomers, Gen Xers and nexters — what motivates them, how they communicate, how they want to be treated and their view of work as it pertains to their lives as a whole.



*Dianne Durkin has more than 25 years experience in training and development, finance, direct sales and international marketing. She has held vice president and president level positions with companies including GE, Gulf Oil, Digital Equipment Corp. and Corporate Branding Partnership.*

#### 508 THE HUMAN FACTORS

E Keyword: Performance Management

### The Sound of Quality: Keys to Effective Call Monitoring

**Mary Cruse**, *Manager, Worldwide Service Center, Cardinal Health*

Everybody knows the importance of metrics for measuring the quantity of what we do. Call Monitoring is all about quality. Do you know what a quality customer interaction would sound like? Are your analysts meeting that quality expectation? In this session you’ll learn: how to set up a call monitoring process, what specifically to measure, how to create the call monitoring form, and what is the latest in monitoring technology.



*Passionate about customer service, Mary Cruse has led support teams for Fortune 500 companies for more than 25 years. Mary is an HDI-certified instructor and holds HDI HDA and HDM certifications. She is president of the San Diego Chapter of HDI and chairs the HDI Member Advisory Board.*

#### 509 THE TECHNOLOGY ZONE

I/E Keywords: eSupport / Tools in Action

### Measuring Support Automation Success in Real-time

**William Mahan**, *Senior Director of Application Support Services, Marriott International*

**Michael Lehane**, *Senior Product Manager, SupportSoft, Inc.*

Enterprises don’t have to wait for the long-term vision of autonomic computing to be built into products and services. In this session, learn how real-time service technologies such as self-healing, self-service and web-based assisted service are changing how world-class organizations deliver global support. Hear first hand from William Mahan of Marriott International, one of the most trusted names in hotels, on how Marriott is utilizing real-time service management in its own corporate help desk supporting 2,400 hotels and 35,000 PCs.



*Bill Mahan’s career encompasses 20 years of various positions with Marriott in property operations, HR, training and IT. Michael Lehane has served as the lead author of eight academic publications in the areas of knowledge management, decision support systems, case-based reasoning and artificial intelligence for design and diagnostic domains.*

#### 510 THE TECHNOLOGY ZONE

I/E Keywords: eSupport / Tools Maximization

### eSupport Tools: Maximizing Impact

**Tom Smetana**, *Practice Director, Spherion*

A multitude of eSupport tools is available in today’s marketplace, from text chat and voice over IP, to self-healing and self-service tools. In this session, gain a better understanding of these tools, why you need to blend them to be competitive and what impact these tools have on the support environment, customer service and the bottom line.



*Tom Smetana has more than 24 years of experience in the IT service and support industry. Prior to joining Spherion, Tom was a solutions design consultant with ARC and provided the planning, designing, developing and implementation of help desks and customer service projects as the technical support for the sales organization. Tom has professional affiliations with HDI, and is currently president of the Motown chapter.*

#### 511 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Process Management

### Service Desk Metrics: Garbage In — Garbage Out

**Gary Case**, *Senior Consultant, Pink Elephant*

Every month your service desk produces report after report, and you may wonder, “Does anyone ever read these reports?” How do you know if you are capturing and measuring the right metrics? This session will review the different types of service desk metrics, the good and bad of each metric and how metrics drive a person’s behavior. It will also review the different metrics that are required to meet the varying needs of management, the business and the service desk itself and avoid garbage in-garbage out.



*Gary Case has provided consulting and educational services to service and support organizations for 11 years. He puts his focus on helping organizations improve their overall IT Service Management by implementing and training on the ITIL best practice processes.*

#### 512 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Business of Support

### Irresistible Marketing Tactics for Your Support Center

**Heather Donnelly**, *Consolidated Call Center Manager, Computer Sciences Corporation*

This idea-filled session will share how-tos, marketing tool samples and templates, and proactive ideas for marketing your help desk. We will discuss the pitfalls of not effectively marketing your help desk from a budget perspective, as well as from a client satisfaction perspective. Woven through the discussion will also be techniques for empowering your help desk personnel and inspiring them to provide excellent customer service — the best marketing tool of all!



*Heather Donnelly has more than 20 years of experience in the support industry. She holds the HDI Help Desk Manager Certification at the mastery level. She is also the newsletter editor and an officer of the Capital Area HDI local chapter.*

# session block 6

Thursday 8:15 am - 9:30 am

## 601 EXECUTIVE FOCUS

I *Keyword: Trends & Future Visions*

### IT Governance Unraveled

**Troy DuMoulin**, *Managing Consultant, Pink Elephant*

The role and the very definition of IT governance is changing in the face of the external pressures of international legislation. Enforcement of IT controls and the application of standards such as ITIL, CMM, and ISO 7799 are no longer an option for publicly traded companies. This session will cover the key activities of IT governance. It will include an introduction of COBIT and how it applies to Sarbanes Oxley and publicly accepted IT management frameworks. Special consideration will be given to the impact on the support center and documentation requirements.



*Troy DuMoulin is an experienced managing consultant with a solid and rich background in business process re-engineering. He holds the management certificate in ITIL and has extensive experience in leading service management improvement programs.*

## 602 ISSUES & ANSWERS

E *Keyword: Customer Service*

### The Four Eyes to Nurturing Your Customers

**Eric Rabinowitz**, *CEO, DEMA Education*

New help desk managers often concentrate on core processes such as problem management, people management and technology management. Customer relations is usually not on the top of their list. But, make no mistake, customer management is at the top of the CIO's list. The strategic help desk is all about customer and business centric organizations. There's nothing more important than your customers. Hear from the expert, Eric Rabinowitz of the Nurture Institute, on how to transform your organization from a user to customer centric organization. Learn the "Four I's" of a successful transformation: Identify, Individualize, Interact and Influence, and take home a worksheet to show you the way.



*Eric Rabinowitz is a certified HDI Instructor and an HDI Instructor Trainer, as well as a much sought after speaker. He is a member emeritus of HDI's strategic advisory board, HDI Certification curriculum committee and HDI SCC standards committee.*

## 603 ISSUES & ANSWERS

I *Keyword: Process Management*

### Journey from Ordinary to Best-in-Class: Saudi Aramco Support

**Fawzi Al-Matar**, *Administrator, Computer Systems Division, Saudi Aramco, ECC*

Discover the challenges faced by Saudi Aramco, ECC in its goal to achieve the prestigious 2004 HDI Internal Team Excellence Award. Learn the processes involved in the five-year drive to transform a reactive support structure into a proactive award-winning support center. Find out how preparing for the HDI Team Excellence Award helped Saudi Aramco, ECC stay on the road to excellence with high customer satisfaction, quality service, employee loyalty and the prudent use of technology with lower costs.



*Fawzi Al-Matar was the first process owner of problem management, and it was under his supervision that the initiative was taken to reorganize the ECC support structure from a reactive to proactive strategy. His current position makes him an administrator controlling the three processes: help desk, financial management, and customer relationship management.*

## 604 ISSUES & ANSWERS

E *Keywords: eSupport and Tools in Action*

### Secrets to Successful Web Self-service

**James Irion**, *Senior eSupport Product Manager, Dell Inc.*

Learn how Dell pioneered web self-service to enhance customer satisfaction and loyalty — and at the same time improved its support capabilities. Don't miss this session featuring a senior manager from the world's largest computer manufacturer and PC retailer sharing how his company increased customer satisfaction and improved its support operations. Learn how you can benefit by leveraging knowledge management and web self-service. This session will explain how to identify the underlying problems commonly encountered and how to correctly address them by utilizing these applications. It will also cover what large enterprises should consider when evaluating a strategy focused on customer self-service.



*James Irion is a Dell.com veteran, and an online founder of the original Dell commerce website. In his current role as senior product manager with Dell's consumer marketing division, James' primary responsibility is leading the creative and support efforts for the Dell Support website.*

## 605 ISSUES & ANSWERS

I/E *Keyword: Trends & Future Visions*

### Next Generation Global Business: Getting High Performance Virtually

**Jaclyn Kostner**, *Ph.D., President, Bridge the Distance, Inc.*

Preparing large support organizations for the adoption of enterprise-wide support processes and tools is never easy. Resistance to change, user demographic challenges and inconsistent messaging can plague the effort. However, the value of globally leveraged support processes and tools can be seen in hard dollars through increased efficiencies and improved service levels. Learn how a global managed service provider accomplished this formidable task by harnessing the power of the web. If you want to achieve dramatic improvements in virtual team interaction and productivity, then attend this session. You'll learn what you need to know to be successful.



*Dr. Jaclyn Kostner is an internationally recognized expert on virtual leadership, virtual teamwork, and virtual communication. A best-selling international business author, her books include Knights of the Tele-Round Table, Virtual Leadership, and Bionic eTeamwork.*

## 606 ISSUES & ANSWERS

I/E *Keyword: Team Development*

### Vertical Visions: The Open Door

**HDI Faculty**

Vertical Visions is about getting and sharing skills, knowledge, and expertise within your industry community — not only at this conference, but once you return home. Take advantage of these opportunities to meet your industry peers throughout the week and exchange useful ideas you can use.

Reconvene in the "Open Door" during this last session of the week to share key learnings, compile action ideas that you will take back and establish a framework for continuing dialogue year round.

**"The ideas and knowledge shared was the most useful I have ever received since starting my career as a help desk manager."**

SPERRY HOPE, IS MANAGER, O.C. TANNER

#### 607 THE HUMAN FACTORS

I/E Keyword: Process Management

### Shaken, Not Stirred: Mixing Correct Data to Determine Staffing

**Jeanette McGillicuddy**, Senior eService Consultant, Alternative Resources Corporation

Are you 'stirring' a pot of numbers to determine staffing levels? Staffing is the highest dollar cost for a help desk or call center. With costs rising, hiring the correct staff has become a greater challenge. This presentation will discuss how to determine the correct number of staff, how to determine FTE numbers, what factors impact staffing levels, how to schedule and address workload peaks and utilization, what tools are available and how to maximize performance. Join us as we 'shake the numbers' correctly and help you with your staffing questions. Case studies will be used to demonstrate how to do the calculations to correctly determine staffing based on business requirements.



*Jeanette McGillicuddy is an information systems professional with 24 years of management, education and consulting experience for organizations ranging from colleges to Fortune 500 corporations. She has expertise in all areas of the service and support industry.*

#### 608 THE HUMAN FACTORS

I/E Keyword: Team Development

### Leading the Seven Dwarves: It's Harder Than You Thought

**Joanne Smikle**, President, Smikle Training Services

You think Snow White ran off with a handsome prince? No! She got sick and tired of trying to lead those doddering dwarves to peak productivity. This insightful presentation takes the mystery out of leading even the most cantankerous characters to create the fairy tale organization. This presentation links the components of emotional intelligence with savvy leadership tools you can use. Learn to strategically lead your organization through turmoil, transition and tension. Get ready to learn the secrets of smart staffing, responsible resource allocation and promoting peak performance. This interactive session is as enlightening as it is entertaining.



*Joanne Smikle creates practical, results-oriented consulting and training interventions for leading organizations. She partners with executives to design innovative performance improvement strategies that address business imperatives. Her areas of expertise are leadership development, team building and customer satisfaction.*

#### 609 THE TECHNOLOGY ZONE

I/E Keywords: Trends & Future Visions / Tools Maximization

### Developing a Ubiquitous Support Environment with FAQs

**Kaneto Kanemoto**, President & CEO, OKWeb Inc.  
**Tatsumi Yamashita**, Founder & CEO, HDI Japan

FAQs are already very well utilized and useful tools for customers and support centers, FAQs can also have strategic business impact. Learn how to develop a ubiquitous support environment using FAQs, online community and cell phone technologies. You will find this state-of-the-industry session informative and essential for planning for the future of your support organization.



*Kaneto Kanemoto has managed the online Japanese knowledge community since 2000 by using online Q&A to solve consumers' problems. Tatsumi Yamashita has 20 years of support industry experience and established HDI-Japan in 2001 based on the strong demand of Japanese support service industries.*



#### 610 THE TECHNOLOGY ZONE

I Keyword: Security

### The Next Phase in Identity Management: Extended Provisioning

**Kurt Johnson**, Vice President, Courion Corporation

Many help desks are struggling with the challenge of providing new or transferred employees and partners access to critical IT resources. And, IT resources is just part of the problem. Add in facilities, telecommunications (voice mail, cell phone, pagers), security (badges), corporate credit cards, etc., and the costs, complexities and deployment risk all increase dramatically, and often result in employee dissatisfaction. Learn to deploy an automated solution for extended provisioning; one that provides internal service teams and end-users with a more coordinated process for delivering services, improves service quality, reduces turnaround time for employee requests and dramatically reduces costs.



*Kurt Johnson is a respected industry expert. He has also written for and been quoted regularly in numerous business and trade publications. Prior to joining Courion, he was VP of META Group's service management strategies program. His career also includes positions with IDC, The Bentley Group and Digital Equipment.*

#### 611 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Process Management

### Calming the Chaos of a Reactive Help Desk

**Stephen Sellaro**, IS Customer Service Center Manager, J.B. Hunt Transport Inc.

If, according to the HDI support center maturity model, your help desk is in the "reactive stage," then this session is for you. Don't reinvent the wheel. Learn how Stephen Sellaro of J.B. Hunt Transport calm the help desk chaos and led his team to become a proactive support organization. You'll learn proven methodologies and strategies for moving from a reactive to proactive organization; achieving stability and buy in with customers, business partners and immediate support staff and what steps to take to identify where you are today, where you need to be and how to get there.



*Stephen Sellaro has a proven track record in the IT industry with more than 20 years of IT support experience. His skills were developed while working for a major retailer and transportation company. Computer World rated Stephen's current employer as the 4th best place to work in IT. Stephen is HDM-certified.*

#### 612 THE TECHNOLOGY ZONE

I Keywords: Trends & Future Visions / Tool Savvy

### Discoveries in Depth: Technology Deployment in the Mobile and Wireless World (Part 1)

**Todd Lammle**, CEO, GlobalNet Training, Inc.

What do you need to stay connected to the Internet wherever you are? Laptops, phones, PDAs and other data products are becoming more and more focal, and it takes more technology than ever to stay connected. So, how do you create policies and support practices for all the new wireless technologies that are out now? And, what about security? Whether you work in a large, small, or even a mobile office, this seminar is for you if you want to support the wireless applications proliferating your organization. Part 1 of this workshop focuses on where the technology is today and how to maximize it. Part 2 focuses on emerging mobile technologies. (Session 408, Networking 101, is a good prerequisite session for novice managers.)



*Todd Lammle has been involved in computers and networking with Fortune 500 companies for more than 20 years. His hands-on experience has been instrumental in designing his unique way of making complex and difficult-to-understand networking concepts more fun.*

# session block 7

Thursday 9:45 am - 11:00 am

## 701 EXECUTIVE FOCUS

I/E Keyword: Trends & Future Visions

### Getting Started with Peer Support Communities

**Greg Oxton**, Executive Director, Consortium for Service Innovation

Support leaders like Microsoft, Novell, and Business Objects have a “secret weapon” in their support centers: passionate users who provide support for free. Learn how industry leaders reduce incidents, gain insight and build loyalty with expert forums. Hear best practices, how to overcome common objections, and list key success factors for online communities. You’ll leave with a concrete set of steps to start effective communities in your help desk or support center. This session assumes and builds on familiarity with self-service, assisted support and metrics commonly used in the industry.



*Greg Oxton's specialty is customer service strategy and organizational development. He joined the Consortium in 1996 as executive director. Through his work over the past nine years in facilitating the process of collective thinking and collective experience, Greg has developed a keen insight into the KCS principles and the process of adoption.*

## 702 EXECUTIVE FOCUS

I Keyword: Business of Support

### My Gas Tank Is Off-line

**Ken Wendle**, Senior Solution Architect, Hewlett-Packard Company

Ah! The golden promise of the 21st century, where everything is computerized! And that means EVERYTHING, from your music and photo collections to your ability to purchase something as esoteric as “vintage candy” or as basic as gasoline. Where does IT service end and business service begin? How do we effectively manage this? Ken examines the theory and practice to becoming a more adaptive, agile and responsive organization.



*A recognized expert in the IT service management field, Ken Wendle has a broad background in areas ranging from expert systems development to project management to systems and application administration. Ken has earned the Certificate in IT Infrastructure Management (the ITIL Master Certificate) and is an HP Certified Consultant.*

## 703 ISSUES & ANSWERS

I Keyword: Tool Savvy

### Charting the Course for Microsoft Products Support

**JJ Murray**, Solutions Architect, Visalign, Inc.

Does it seem like technology changes just as your support organization gets really proficient? Have you ever wished you had a crystal ball that could reveal which technologies were just over the horizon? It can be difficult to anticipate which products are changing, when the change will take place, and how these factors will impact the way our customers do business. Learn about Microsoft's systems strategy, product roadmaps and how we, as support professionals, must prepare for those changes. Topics will include the Information Worker Platform, Windows SharePoint Services and upcoming platforms like Singray, Kodiak, Jupiter, and Yukon.



*John Joseph (JJ) Murray is dedicated to helping customers envision ways to meet their strategic business objectives with Microsoft technologies while considering their unique organizational needs. He is a subject matter expert on infrastructure, Microsoft products, help desk, IT support organizations, and the ITIL and MOF best-practice frameworks.*

## 704 ISSUES & ANSWERS

E Keyword: Performance Management

### Using the Right Metrics Effectively

**Kitty Chaney-Reed**, Director of Service Delivery, Radiant Systems

As seasoned professionals, we often get so focused on operations that we forget the strategic value our organization brings to the business. How do you measure the value of your support center? How do you quantify success? Are you using the right metrics to drive the performance behaviors you really need? Are you reporting the results that your company and customers really care about? This session will give support veterans an opportunity think about the best way to measure their support center's value and progress, and how to add a strategic focus to an already solid operational foundation.



*Kitty Chaney-Reed has more than 10 years of experience in help desk management, human resources management and consulting, and leads the help desk and consulting services organizations for Radiant's PCS North America Division. Kitty spearheaded the development of the metrics and reporting system currently used to manage Radiant's help desks.*

## 705 ISSUES & ANSWERS

I Keyword: Outsourcing

### Bringing Outsourced Support In House

**Jonathan Wester**, Manager, I.S. Service Center, Devon Energy Corporation  
**Michael Sherry**, Supervisor, I.S. Service Center, Devon Energy Corporation

Tired of poor service from an outsourced help desk? Examine the decision-making processes for bringing an outsourced help desk solution in-house. You'll hear an example of how this company sold the new solution to its own department, as well as to its clients; and learn the metrics used to measure success.



*Jonathan Wester brings more than 15 years of call center knowledge and 10 years of managing technical call centers and training, and he successfully lead the project of developing an in-house help desk that had previously been outsourced. Michael Sherry has more than 18 years of experience providing technical training and support to corporations, government agencies, professional organizations and educational institutions, and supervises all aspects of the operation and administration of the Devon IS Service Center.*

## 706 ISSUES & ANSWERS

I/E Keyword: Team Development

### Vertical Visions: The Open Door

HDI Faculty

Vertical Visions is about getting and sharing skills, knowledge, and expertise within your industry community — not only at this conference, but once you return home. Take advantage of these opportunities to meet your industry peers throughout the week and exchange useful ideas you can use.

Reconvene in the “Open Door” during this last session of the week to share key learnings, compile action ideas that you will take back and establish a framework for continuing dialogue year round.

**“There is no better way to revitalize your service management organization and yourself.”**

STUART COHEN, TECH SUPPORT LEAD, ARBITRON, INC.

#### 707 THE HUMAN FACTORS

I/E Keyword: Performance Management

### Total Performance Management — Or Else

Steve Murtagh, *Managing Partner, InterVox Group, Inc.*

Performance management is all the rage in the conference room and on the exhibit floor. But without the context of business objectives, metrics can be irrelevant or misleading. Without well-designed reports that are meaningful to financial and non-support executives, the best contact centers may struggle in vain to get the political and financial support they need and deserve. Learn how to successfully take the first steps in moving from performance measurement to total performance management.



Steve Murtagh has more than 20 years of experience in the call center, help desk and customer support industries. His consulting experience includes engagements in a broad range of industries in North America, Europe and the Middle East, and he is a certified auditor for HDI's Support Center (SCC) Certification Program.

#### 708 THE HUMAN FACTORS

I/E Keyword: Team Development

### 23 1/2 Big Fat Lies About Help Desks

Barry Leinbach, *President, Barry Leinbach and Associates*

Have you ever heard your help desk agents say, “This is only a dead end job.” Or, “Management keeps statistics so they can dump on us.” How about, “Angry customers are lost forever,” and “My customers will always be there.” If this is what your staff believes, they will stop learning and stop pushing themselves to new levels. Your help desk will eventually become a “Ho Hum Desk.” In this humorous presentation, we'll at some of the best lies a CSA hears and discover ways of dealing with them.



Barry Leinbach has more than 20 years of experience in the IT call center industry, and is an expert in customer service excellence, help desk support and communications skills. He uses real-life experiences to teach support professionals how his solutions can be applied effectively.

#### 709 THE TECHNOLOGY ZONE

I Keyword: Infrastructure Management

### Effectively Managing End User Systems to Achieve Proactive Support

Kim Hunter-Peat, *Manager, Incident Response Team, AGL Resources*  
Howie Markson, *Vice President, Reflectent Software, Inc.*

Are you interested in increasing end-user satisfaction, reducing support costs and improving productivity by moving from a reactive support organization to a proactive one? This session will focus on how to achieve proactive support by better managing the end-user desktop, its applications and the hardware itself. It will specifically address the Windows desktop and how to integrate end-user workstation management into existing systems management solutions, providing a comprehensive management answer from within a single console.



Kim Hunter-Peat is the manager of the incident response team, a group consisting of the help desk and the desk-side teams at AGL Resources. Prior to managing the IRT, Kim was a member of the desk-side team. Prior to joining Reflectent as VP, Howie Markson was with Cisco

Systems, where he had product management responsibilities for content switching and related security product lines.

#### 710 THE TECHNOLOGY ZONE

I/E Keywords: Outsourcing / Tools Maximization

### Realizing Results with Managed Service Solutions

Technical support organizations face tough challenges to lower costs without affecting end-user service levels. Learn how an industry-leading support organization increased end-user satisfaction, improved business productivity, and lowered operating costs using a remote support solution. This session will examine the benefits of remote support technology and the impact on first contact resolution metrics, incident-handling time for more complex and mission-critical incidents, and customer satisfaction ratings.

#### 711 ESSENTIALS FOR NEW SUPPORT MANAGERS

I/E Keyword: Customer Service

### Avoid Service Mediocrity: Soaring with Eagles Instead of Flocking with Pigeons

Jim McKennan, *Consultant for Quorum Technologies, VP Quality and Excellence of Sacramento*

Have you noticed that mediocrity has been passing for good service for quite some time? Has mediocrity crept into your support organization? The American Customer Satisfaction Index (ACSI), a cross-industry national economic indicator of customer satisfaction, reports a steady decline in customer satisfaction since 1994. In this session, look at service from a new perspective, and learn how to soar with the eagles and gain practical ideas on how to stand out as a service provider to differentiate your team from the mediocrity that abounds.



Jim McKennan has been a customer service practitioner for three decades, and has written a booklet on Customer Service for the IT Professional. He is vice president for quality and excellence for the HDI Sacramento local chapter, and serves as the Western region director for HDI's Member Advisory Board.

#### 712 THE TECHNOLOGY ZONE

I/E Keywords: Trends & Future Visions / Tool Savvy

### Discoveries in Depth: The Future of Mobility (Part 2)

Todd Lammle, *CEO, GlobalNet Training, Inc.*

There's a lot more to wireless networking than IEEE 802.11. We're talking worldwide connectivity-always-on, anywhere, anytime, reliable connectivity, and 802.11 is just a part of that picture! This part picks up where the Future of Mobility-Part 1 leaves off (however, it is not a prerequisite). In the very near future, you will be connected to the Internet, as well as at your home office at all times. Attend this seminar and learn all about the future of mobility so that you are fully prepared for that future-now!



Todd Lammle has been involved in computers and networking with Fortune 500 companies for more than 20 years. His hands-on experience has been instrumental in designing his unique way of making complex and difficult-to-understand networking concepts easy and fun to learn.

# registration & travel

**“This is the most useful, beneficial and motivational conference available. All help desk staff should attend the HDI Conference at least once in their career — the earlier the better. The same applies to management.”**

DANIEL BLAIN  
SUPPORT CENTRE  
MANAGEMENT, NSERC



*HDI 2005 offers two customized conferences packages to meet your specific learning and professional networking needs:*

## The Full Vision Package

*(Full Conference Package) — \$1,395*

The full conference registration for our 3-day event, includes:

### The Program

- 4 exceptional, inspiring Keynote speakers
- 6 innovative, thought-provoking Visionary Presentations — afternoon mini-keynote sessions
- Comprehensive conference program with more than 90 content-rich breakout sessions in five tracks for every level of support professional
- Conference proceedings handouts for each session
- Conference & Exhibitors Guide
- Access to industry resources including the Messaging Center, Support Superstore, and session CDs

### Networking Features

- Conference Orientation Session
- Daybreak Discussion Groups
- Afternoon of Discovery — an afternoon of bright ideas you can take back to your organization
- Vertical Visions
- The Party Zone — including the welcome reception and the most anticipated conference festivities in the industry
- 3 Breakfasts, 2 Lunches and Beverage Breaks

### Products & Services

- The Discovery Zone Expo Floor — interactive, action-packed Expo with top providers of internal and external technical support technologies, products and services
- Technology education and product showcases that include the latest tools and services for the IT and customer support organization
- The Launch Pad — the hot stage for new product introductions
- The Discovery Zone Prize Giveaway

## The Discoverers Package

*(Executive Networking Package) — \$1,795*

A special networking package exclusively for senior executives. **Facilitated by Doug Whittle**

It's rare to find so many of your peers in one place. Take advantage of exclusive, unencumbered time to network with your peers - other senior IT, service and support executives responsible for the strategic direction of their organizations. These specially scheduled activities running throughout the conference will add immeasurably to your conference experience. Take advantage of all the conference has to offer, and then huddle with other executives to share the new ideas you've heard, help others examine alternative strategies and ideas, and begin a dialogue that will grow throughout the year.

The Discoverers Package includes The Full Vision Package (full conference package), plus:

### Special networking time includes:

- Formal seated breakfast, Tuesday and Wednesday mornings. Casual conversation and group discussions using an open space model, guided by leadership expert Doug Whittle
- Formal seated luncheons Tuesday and Wednesday. After a relaxing lunch, enjoy leading-edge presentations by Jim Harris and Dean Meyer
- Special social activities planned just for The Discoverers, including an exclusive VIP Reception with HDI's founder and CEO, Ron Muns
- Select from among more than 90 conference sessions. While the Executive Track explores strategic and longer-term planning issues and challenges that may be on your horizon, feel free to attend any sessions of your choice throughout the week
- The Discoverers Afternoon of Discovery — continuing group discussions on Tuesday afternoon using an open space model, guided by leadership expert Doug Whittle
- Enjoy reserved seating in the general sessions
- Special Discoverers Activity on Monday, details to follow

**"The conference was a great value for my time and money invested."**

JOE MENTASTI, IT HELP DESK MANAGER, ANTHEM

# information

## Pre-conference Workshops\*

2-day HDI Certification training workshops (Sunday & Monday) — \$995  
1-day Pre-conference workshops — \$395

## Conference Discounts and Team Discounts

- Register by December 17th to receive a FREE one-day pre-conference workshop (a \$395 value)!
- Register before January 14th to receive a \$100 early bird discount.
- HDI members receive \$100 discount.
- HDI Conference alumni receive \$100 discount.
- Pay for five team members, bring the sixth FREE!

## Discounted Airfares Available

United Airlines is the official carrier of the HDI 2005 Conference. To take advantage of these special discounted fares, you may reach United Airlines directly by phoning:

### United Airlines

800-521-4041  
ID Code: 530CB

## Discounted Car Rental Rates

### Avis Corporation

800-331-1600  
ID Code: J866427

## What to Wear

Dress casually and comfortably to enjoy this working conference.

## Pre-registration

To speed your check-in at the Conference, please register early for this leading industry event.

To register, please call our Member Services Center at 800-248-5667 or visit [www.thinkhdi.com/hdi2005](http://www.thinkhdi.com/hdi2005) to register online.

*\* In rare instances, a pre-conference workshop may be cancelled. HDI will provide at least 10 days notice, and will provide a full refund if the workshop is canceled. HDI cannot be responsible for penalties resulting from discounted airfares.*

## Payment

To expedite your registration, please have your Visa, MasterCard or American Express card available when you call, or mail your payment by check or credit card. Billing is available. Invoices are payable upon receipt and prepayment (or a federal government purchase order) is required by March 4, 2005. Please make checks payable to HDI. To register by phone, please call our Member Services Center at 800-248-5667 or visit [www.thinkhdi.com/hdi2005](http://www.thinkhdi.com/hdi2005) to register online.

## Cancellation Policy

All cancellations must be made in writing. You may cancel without penalty until January 28, 2005, after which a \$150 cancellation will be charged. Cancellations after February 7, 2005 or no shows will be charged the full conference rate.

## Conference Hotel Information

### The Venetian Resort

3355 Las Vegas Blvd. S.  
Las Vegas, NV 89109  
Phone: 702-414-1000 or 877-883-6423  
Fax: 702-414-1100  
[reservations@venetian.com](mailto:reservations@venetian.com)

All conference activities will be taking place at The Venetian Resort. Special conference rates have been reserved for HDI 2005 conference attendees:

- \$209 single/double occupancy (king bed)
- \$269 single/double occupancy (two queen beds)

To make reservations, please call 702-414-1000 or 877-883-6423 and reference the HDI 2005 conference rate. Hotel sleeping rooms will be held until **February 10, 2005** (or until sold out) and will be based upon availability after this date. HDI 2004's hotel rooms sold out early. Please make your reservations now!



**Register Today!** 1-800-248-5667 • [www.ThinkHDI.com/HDI2005](http://www.ThinkHDI.com/HDI2005)

March 6-10, 2005 • The Venetian Resort, Las Vegas

## 5 EASY WAYS TO REGISTER:

1. Register Online: [www.thinkhdi.com/hdi2005](http://www.thinkhdi.com/hdi2005)
2. Fax: 719-268-0184
3. Phone: Call 800-248-5667 or 719-268-0174
4. Email: [info@thinkhdi.com](mailto:info@thinkhdi.com)
5. Mail: HDI, 6385 Corporate Drive, Suite 301, Colorado Springs, CO 80919

Please supply all information requested.

### 1. MY REGISTRATION INFORMATION

PLEASE PRINT: To register additional attendees, please photocopy this form.

Name \_\_\_\_\_ Title \_\_\_\_\_  
 Company \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_  
 Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_  
 Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
 Email \_\_\_\_\_

### 2. PLEASE REGISTER ME FOR:

#### HDI 2005 Conference Packages:

- The Full Vision Package (Full Conference Package) \$1,395 \$ \_\_\_\_\_  
 The Discoverers Package (Executive Package) \$1,795 \$ \_\_\_\_\_

#### Pre-Conference Workshops:

- 2-day Workshops** \$995 \$ \_\_\_\_\_  
 Pre-1  Pre-2  Pre-3  Pre-4
- 1-day Workshops** \$395 \$ \_\_\_\_\_  
 Pre-5  Pre-6  Pre-7  Pre-8  
 Pre-9

#### Discounts (check all that apply and total amount): - \$ \_\_\_\_\_

- HDI Members (-\$100)  
 HDI Conference Alumni (-\$100)  
 FREE Pre-conference Workshop: Register before 12/17/2004 (-\$395)  
 EARLY BIRD: Register before 1/14/2004 (-\$100)  
*(no member, alumni or early bird discounts may be applied to pre-conference workshop fees)*

#### Membership

- Sign me up for a Silver HDI membership \$115 \$ \_\_\_\_\_  
**Total Due \$ \_\_\_\_\_**

### 3. PAYMENT INFORMATION

- Please charge my:  Visa  MasterCard  American Express

Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_  
 Signature \_\_\_\_\_

- Check (Make Payable to HDI)  Bill me

**Cancellation policy:** All cancellations must be made in writing. You may cancel without penalty until January 28, 2005, after which a \$150 cancellation fee will be charged. Cancellations after February 7, 2005 or no shows will be charged the full Conference rate.

To help us determine demand, please indicate the reference number of the session of most interest to you in each time block. This does not commit you to these sessions, it just lets us assist in planning the most appropriate room size and selecting repeat sessions.

Block 1 # \_\_\_\_\_ Block 4 # \_\_\_\_\_ Block 7 # \_\_\_\_\_  
 Block 2 # \_\_\_\_\_ Block 5 # \_\_\_\_\_ Afternoon of \_\_\_\_\_  
 Block 3 # \_\_\_\_\_ Block 6 # \_\_\_\_\_ Discovery #D- \_\_\_\_\_

- Please send me information about becoming a member of HDI.  
 Please contact me about becoming a sponsor of HDI 2005.

### 4. PROFESSIONAL INFORMATION

#### 1. Please indicate the category that best reflects your primary area of responsibility:

- Help Desk  
 Customer Service  
 IS/IT  
 Executive Management  
 Call Center  
 Software/Technical Support  
 Consultant  
 Other, please specify \_\_\_\_\_

#### 2. How many employees work in your organization?

- More than 50,000  
 20,001-50,000  
 5,001-20,000  
 2,001-5,000  
 501-2,000  
 51-500  
 1-50

#### 3. What is your organization's IT budget for the next 12 months?

- More than \$20 million  
 \$5,000,001-\$20,000,000  
 \$500,001-\$5,000,000  
 \$50,000-\$500,000

#### 4. What percent of the above IT budget will be spent on support products and services?

- Less than 25%  
 25%-49%  
 50%-74%  
 75%-100%

#### 5. What is your primary job function?

- IT/IS  
 Technical Support  
 Help Desk  
 IT Infrastructure/Enterprise Mgmt  
 IT/Customer Technical Support  
 Front line Technical Support/Mgmt  
 Level 2/3 Technical Support/Mgmt  
 Other: please specify \_\_\_\_\_

#### 6. Which of the following best describes your level of responsibility?

- Executive  
 Director  
 Manager  
 Supervisor  
 Staff

#### 7. What type of support do you provide?

- Internal Technical  
 External Technical  
 Both Internal and External

#### 8. Are you involved in the purchasing decisions for any of the following? (Check all that apply)

- Technical Customer Support/Call Center Software  
 Customer Interaction Systems  
 Contact Management Software  
 Outsourcing Services  
 Computer Telephony Products  
 Asset Management Systems  
 Web-based Customer Service Tools  
 Knowledge Management Tools  
 Help Desk Tools  
 IT Support Tools  
 IT Infrastructure Management  
 Email Management  
 Network Monitoring  
 Telecommunications  
 Customer Satisfaction Measurement  
 Self-help Technologies  
 Self-healing Technologies

#### 9. What is your role in the purchase of the above products and services?

- Approve Purchases  
 Recommend  
 Specify  
 No involvement