2018 HDI Leadership Forum Events
Dates: June 11- 14, 2018
Location: One Ocean Resort | Atlantic Beach, FL
Group: Support Center Leadership
Facilitator: Tom Lewis | tom.lewis@ubm.com

Monday

7:00 pm – 8:30 pm	**Networking Reception**
	All Forum participants are encouraged to attend this social activity. Appetizers and drinks will be served.

Tuesday

7:45 am – 8:30 am	**Breakfast**

8:30 am – 9:00 am	**HDI Welcome**
	Presenter: Allyson Rollins

9:00 am – 11:00 am	**Your Biggest Challenge: Solve My Problem**
	Facilitator: Tom Lewis
	Each person will introduce themselves and provide a description of their biggest challenge. We will share these pain points and address the challenges as a group for each topic.
	*Break when convenient

11:00 am – 12:00 pm	**VIP Service: Roundtable Discussion**
	Facilitator: Tom Lewis
	Do you offer VIP service? Who in your organization is responsible for VIP service? How is your VIP service structured? How are you routing VIP contacts?

12:00 pm – 1:00 pm	**Lunch**

1:00 pm – 3:00 pm	**Managing Remote Workers**
	Presenter: Bill Thallemer
	When managing a remote workforce how do you train your employees, build morale, keep them engaged and function as a team? What is the best way to handle multiple time zones? Is

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working remote considered a privilege? What do you include in a remote employment agreement? How do you keep it consistent? Should there be a different policy for exempt vs. nonexempt employees?   What should the company provide for remote employees (internet connectivity, phone lines)?   What is needed for remote employment? How does a remote employee best resolve issues via IM or chat? How should they resolve technology issues?

*Break when convenient

3:00 pm – 4:00 pm	**Chat follow-up: Roundtable Discussion**
	(possible virtual call before June meeting)
	Facilitator: Tom Lewis
	Possible First American – chat case study? **Chat lessons learned; how do you train your staff especially with writing? What do you have for onboarding documentation? What is the skill set? What tools are you using or considering for chat? How do you measure the effectiveness of chat? How have you or will you integrate chat? Do you use automation for chat? How many chats can you have at one time?**
4:00 pm – 5:00 pm	**Facilitated Parking Lot Discussion/ Future Topics**
	Facilitated by: Tom Lewis
	This is an opportunity for open discussion regarding challenges faced, successes experienced, tools, RFPs, vendors, etc. Take this time to ask questions of your peers, share ideas or generate topics that are not mentioned on the agenda. What are some current issues you are facing that you would like to discuss? Use your post-it notes to capture your thoughts throughout the day not pertaining to the agenda items. Utilizing the parking lot area in the meeting room, stick your topic, idea or question in the designated area to be discussed at this time during the day.
5:00 pm – 6:30 pm	**Free Time**
6:30 pm – 8:30 pm	**Group Dinner**
Wednesday	
7:45 am – 8:30 am	**Breakfast**

8:30 am – 9:15 am	**Group Workshop / Session/ Activity** **Facilitated by: Allyson Rollins or SME** **This will consist of circuit discussions, SME Workshop or another group activity.**
9:15 am – 9:30 am	**Break**
9:30 am – 10:45 am	**Self Service Portal: Show and Tell** *Presenter:* **Self Service Portal and your ticketing system: What tool are you using? Were you using a different tool before implementation? What was your implementation process? How did you gain buy in? What is working well? What areas could use improvement? How do you measure success? What reports do you run? How do you categorize?** ==**Come prepared to share your ticketing system with the group.**==
10:45 am – 11:00 am	**Break**
11:00 am – 12:00 pm	**Career Pathing: Roundtable Discussion** *Presenter:* **Do you have a career paths laid out for your employees? Are there certain achievements needed to be promoted? What matters are considered subjective? What role do job descriptions and requirements play in promotions? How does an employee best excel to the next level in IT?** ==**Come prepared with any promotion rubrics to share with the group.**==
12:00 pm – 1:00 pm	**Lunch**
1:00 pm - 2:15 pm	**Session TBD**
2:30 pm – 2:45 pm	**Break**
2:45 pm – 5:00 pm	**Site Tour**

5:00 pm – 5:30 pm	**Free Time**
5:30 pm – 7:00 pm	**Group Reception**
Thursday	
7:45 am – 8:30 am	**Breakfast**
8:30 am – 10:30 am	**Knowledge Management** *Presenter: SME* **Are you using KCS or KM? How do you keep people engaged using KCS? How do you keep the information current? Do you have a QA process in place? What would you differently? How do you gain buy in? What do you consider meaningful metrics? How do you measure KM success? Are your KM articles customer facing? What tools are you using? Do you have a dedicated Knowledge Manager?**
10:30 am – 10:45 am	**Break**
10:45 am – 11:30 am	**Celebrate Success** *Presenter: We need a volunteer to share a recent success story.*
11:30 am – 12:00 pm	**Leadership Forum Closing** *Facilitated by: Allyson Rollins*