# SuperCommunity Banks Call Center Agenda

**Westin Verasa Hotel, Napa, CA**
**March 2 – 3, 2023**

**(Casual attire; jeans welcome)**

## [Wednesday, March 1st]

| | |
|---|---|
| [5:45 PM] | Meet Anat in the lobby. Anat's mobile: (916) 717-1710. |
| [6:00 PM] | Optional dinner offsite*. |

## [Thursday, March 2nd]

| | |
|---|---|
| [7:30 AM] | Breakfast |
| [8:00 AM] | Roundtable Discussion<br>• Bring 2-3 good ideas to share with the group<br>• Bring one best practice<br>• Discuss an example of what not to do (disasters)<br>•. Bring questions you'd like to ask |
| [10:00 AM] | Break |
| [10:15 AM] | Authentication update |
| [11:00 AM] | Fraud |
| [12:00 PM] | Lunch |
| [1:00 PM] | Call mining |
| [2:00 PM] | Dedicated salesforce vs. sales goals for the entire team; outbound calling (and robo-calling) |
| [3:30 PM] | Adjourn |
| [5:45 PM] | Meet in the lobby. |
| [6:00 PM] | Dinner offsite*. |

## [Friday, March 3rd]

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|---|---|
| [7:30 AM] | Breakfast: Topics for our next meeting |
| [8:00 AM] | Benchmarking KPIs (bring yours) |
| [9:00 AM] | DEI-related issues |
| [10:00 AM] | Break |
| [10:15 AM] | Foreign languages handling – disclosure, IVR, account opening |
| [11:00 AM] | Online account opening and onboarding; e-branch; management of online portfolio |
| [12:00 PM] | Adjourn |

***Guests are welcome.**
**Note: Please bring copies for everyone.**