



As a seasoned industry executive, popular speaker and highly regarded consultant, Tim Montgomery has guided thousands of contact center agents and leaders to improve individual and team performance, and exceed operational objectives. Drawing from these interactions and his extensive real-world experience, Tim founded **The Service Level Group** to help customer service centers leverage the competitive advantages they have right at their finger tips. Tim is part of an elite group of independent consultants who have earned a certified associate designation from the **International Customer Management Institute (ICMI)**. He is also a professional member of the **National Speakers Association (NSA)**.

Corporate Experience: Tim's firm grasp of real-world contact center solutions began with 14 years of hands-on operational experience. During his career, he held a variety of leadership positions – everything from Call Center Manager to Vice President of Sales and Operations. Tim's contact center leadership experience was fine-tuned by leading contact center and customer service operations for three of the most celebrated companies in the world – **USAA, The Coca-Cola Company and The SCOOTER Store**. Tim's professional career also includes active duty and reserve assignments in the **United States Navy**.

Consulting Assignments: Prior to founding **The Service Level Group**, Tim was a Consultant, Seminar Leader and Technology Advisor for the **International Customer Management Institute (ICMI)**. Tim's expertise in customer service and contact center operations has allowed him to lead a wide range of consulting engagements for companies in a variety of industries. His consulting clients have included some of the most recognized organizations in America –

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| • DELL | • AIG | • Lifetouch Publishing |
| • Mitsubishi Motors | • Premera Blue Cross | • Deluxe Printing |
| • Allstate | • Revenue Cycle Partners | • Liberty Mutual |
| • Cinergy | • Dept of Veterans Affairs | • SWBC |
| • Gartner Group | • Amerigroup | • Prime Therapeutics |
| • Meguiar's | • Isagenix | • Matrix Absence Mgmt. |
| • Golden West | • Gilsbar Inc. | • Spider Corporation |
| • Sykes | • State of Texas | • Church Publishing Inc. |
| • Kodak | • Borrego Solar | • Inova Solutions |
| • ADP | • Cash America | • Farmers Insurance |

Publishing Highlights & Education: Tim has written articles and whitepapers on a variety of management, customer service, and contact center topics. His work has been featured in many global publications, industry journals and position papers by respected service authorities, such as:

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| • Call Center Management Review | • The US Treasury Department | • Customer Service Newsletter |
| • Foresight Forecasting Journal | • Contact Center World | • Inova Solutions |
| • The Healthcare Strategy Institute | • Connections Magazine | • Destination CRM |
| • Multichannel Merchant | • STI's Knowledge Mail | • CRM Guru |
| • Contact Center Digest | • Search CRM | • Call Center Magazine |
| • INC.Com | • Tech News World | • Knowledge Storm |
| • USAService.Gov | • Call Center Café | • Call Center Operations Online |
| • Contact Professional Magazine | • Customer Management Insight Magazine | • International Customer Management Institute |

He is also a contributing author to highly regarded books on **Leadership and Business Management, Customer Relationship Management, Call Center Operations Management and People Management**

Tim earned both his **BBA in Accounting and MBA** degrees from the **University of Texas @ San Antonio** and a **Lean Six Sigma Certification** from **Villanova University**.



Speaking Engagements



A popular speaker at industry conferences and events, Tim has delivered leadership, customer service and call center presentations to thousands of industry professionals. He often leads one of the service industry's most popular two-day seminars – “Essential Skills and Knowledge for Contact Center Managers.” both in public forums as well as on-site for organizations such as **Allstate Insurance Company; Liberty Mutual; FEMA (Federal Emergency Management Agency); Verizon Wireless; Consumer's Energy of MI; State of California Department of Public Service; Lifeline Systems.**

Tim Montgomery has delivered keynote and customized industry presentations for organizations during off-site planning sessions, executive development retreats and industry-specific conferences. He has developed and delivered seminars to thousands of customer service professionals on topics, such as:

- Moving Metrics into Action
- The Customer Centric Contact Center – How to get there
- Stop Attacking the Queue!
- Reducing the Chaos by Transitioning to a Planning Culture
- Workforce Management – Why Everyone Needs to be Exposed
- How to Leverage Call Center Professionals as Internal Consultants
- Gaining Buy-In From Senior Management
- The Power of Organization-wide Workforce Management
- Getting Back to Basics! Improving Agent Performance and Customer Satisfaction
- An Overview of Call Center Forecasting and Scheduling
- Productivity – ACD Metrics, Mastering the Reports
- Traditional Ties: Remembering Your Call Center Roots
- Cool Case Study - Call Centers on the Internet
- Principles of Advanced Workforce Management
- Staffing for Text Chat, Step by Step
- Reducing the Moment-by-Moment Chaos in the Call Center
- How to Get What You Need: Justifying New Technology
- Getting Back to Basics! 10 Things to do Today
- Agent Occupancy – Master This and You're Well on Your Way
- Big Improvements for Credit Union Call Centers
- Getting Real Results from Real-time Management
- Big Improvements for Small Call Centers (fewer than 60 seats)
- Big Improvements for Large Call Centers (more than 150 seats)

Tim has extensive experience delivering presentations and has a track record as one of the top rated speakers at some of the customer service industry's most popular events, including:

- The World Conference on Incoming Call Center Management (ICCM)
- Annual Call Center Exhibition (ACCE)
- Call Center Demo Conferences
- CRM/Call Center Las Vegas
- CA Credit Union League Annual Call Center Conference
- Blue Cross/Blue Shield Association Call Center Conference
- IQPC benchmarking studies and conferences
- National Credit Union Call Center Conference
- Call Center Knowledge Exchange Conference
- NY Govt. Technology Group Call Center Conference



What clients say about Tim as a Consultant:

"The SCOOTER Store was running a very large, but very inefficient call center before we got Tim's help. Today we are doing more work with less people and our management team has better reports and tools to control the processes. If you would like your call center to increase productivity and employee satisfaction while simultaneously reducing cost, you owe it to yourself to call Tim."

Doug Harrison, Founder and CEO, The SCOOTER Store

"Tim Montgomery's engagement with our contact center provided us with a great return on our investment. He thoroughly reviewed our operation and provided insightful feedback that we could act on immediately. Tim was professional, respectful of our limited resources and highly effective. I would recommend his services to any contact center team regardless of their current capabilities--he will help you take your contact center to the next level."

Carol Trimmer, Vice President Customer Service Operations, Prime Therapeutics

"Tim Montgomery not only knows his business, he has a passion for it. He rolls up his sleeves, digs right in, and provides effective solutions. He's World Class!"

Jim Vitali, Senior Vice President Service Center Operations, SWBC (Southwest Business Corporation)

"Tim is a talented call center consultant. He worked in my organization at USAA and he was my go-to person for all call center activities. I also hired him to do some consulting for Allstate when I was a Sr. Executive with that organization. He did a very professional job and was well received by all of the managers in my organization"

Jeffrey Lewis, former Senior Vice President at USAA and Allstate

"Tim is an amazing and engaging consultant, speaker and trainer. His personal passion and knowledge of call centers overall is so genuine. He knows how to make the "light bulbs go on" at all levels. Tim can come in and help any business or organization identify their opportunities which align with their core values and regroup with a fresh start, producing immediate results and improvements"

Kathy Wright, Call Center Manager, Dell Inc

"At ADP we have a strong focus on delivering quality service to our clients. We chose Tim Montgomery to help us bring our entire management team onto the same "call center page." Tim delivered a program for us that more than met our needs. The audience at ADP was a diverse mix from call center experts to relative novices. Tim's message was detailed enough to satisfy the experts yet simple enough for everyone to learn from. We've already begun to see improvements in a number of areas since Tim's engagement."

Larry Renna, Vice President, Service Operations, ADP

"We always learn so much from you and you have such a positive impact on our Customer Service areas. Once again you have been instrumental in deploying improvements to our centers and providing education that will continue to lead us for months to come."

Pam Warren, Call Center Manager, Premera Blue Cross

"Tim's wealth of knowledge and expertise in call centers contributed in taking us to the next level. Tim assisted us in recognizing the value of service level and by having the right people in the right place doing the right things at the right time. And, by grasping the magnitude of these correct metrics we have seen a drastic increase in the level of our customer service."

Shelley Lampard, Vice President Operations, Gilsbar, Inc.

"Until Tim came along, I thought that consultants were like fortune-tellers, who take your story and feed it back to you in a different format. Tim shattered my stereotype. His independent analysis is valuable, and he offers solutions, not just a fancy PowerPoint summary of the problems. His work has been instrumental in helping us transform our operation. The pricing of his services is below market when compared to the service that he delivers."

Sam Kooiker, Contact Service Center Operations Manager, Golden West Technologies

"He comes highly recommended. He hit the ground running and imbedded himself into our organization nicely. He was able to get at a lot of issues that we didn't know about and others that have been out there for a while that weren't being addressed for one reason or another. He really knows his business and has been a tremendous help to our organization as we work to implement our workforce management system – not to mention all aspects of our operations and supporting business units that he has provided perspective on."

Bob Page, HRC Manager, Dept of Veterans Affairs

"When Tim came to our small center, he treated us as if we were his biggest account. I was particularly impressed at how quickly he seemed to understand our business and our challenges."

Louanne Trueblood, Director of Customer Service, Lifetouch Publishing, Inc.

"From his visit the company gained a far better understanding of the benefits of the Contact Center and also ways to increase efficiency and decrease costs. These included the adoption of new phone technology to implement skills based routing and the use of planning software to better react to call volume changes. I also found Tim to be very professional and easy to communicate and work with."

John Ridge, Director, Home Properties, Inc



What workshop participants say about Tim as a speaker:

Tim has developed and delivered customized programs to thousands of leaders in companies such as USAA, DELL, Farmers Insurance, Sykes, Cash America, Isagenix, ADP, SWBC, Allstate and Kodak. His programs receive the highest possible marks from participants and 100% rate it as something they would recommend to others

<i>This was one of the most informative and entertaining classes I have ever attended. All level of the organization need to get this information.</i>	<i>I have been at this company many years and this course was long overdue.</i>	<i>I got some very good information – I have never been in training like this before.</i>
<i>Was an eye opener and hopefully it will help change the company</i>	<i>Great training – Tim was a great presenter and I learned a lot</i>	<i>Great stuff, Thank you very much!!!</i>
<i>Should be given to anyone in a leadership role.</i>	<i>All of our operations department should attend</i>	<i>We needed this a long time ago. It should have been a week long</i>
<i>More – bring him back, send him everywhere</i>	<i>Tim has a remarkable presence - extremely professional</i>	<i>This course has value for every call center employee</i>
<i>Everything is great! Need to make sure we take action.</i>	<i>Excellent presenter with a very strong and in depth practical experience and exceptional knowledge base</i>	<i>Tim was engaging, transparent and knowledgeable</i>
<i>Should be given to any CC leader because it is a refreshing turn on long standing CC industry beliefs and understandings</i>	<i>Wish it was sooner!</i>	<i>Excellent content. Great building block approach</i>
<i>Very interactive and engaging</i>	<i>Wow. Great new perspective and understanding.</i>	<i>Great job, Tim. Highly engaging</i>
<i>Should be given to everyone in the company</i>	<i>I appreciate the opportunity to develop the groups' top 5 and have them brought to those that can take action. Thanks!</i>	<i>Tim is a leader that can keep you interested in the material</i>
<i>Very impressed with the level of detail and pace. I usually find training courses boring. This was motivational</i>	<i>An understanding helps bring change. Change is a good thing</i>	<i>Tim kept thing light and not overly complicated – made the information valuable</i>
<i>Should be given to anyone in a leadership role</i>	<i>Tim is a great presenter</i>	<i>Amazing stuff. Enlightening. Would like more.</i>
<i>Tim was very exciting and kept me interested the entire time. The best speaker I have ever listened to.</i>	<i>If you work in a call center, you need this information</i>	<i>Needs to be given to department heads – Tim has too much experience and knowledge for us to bypass the opportunity to learn and grow</i>
<i>Tim displays a vast amount of knowledge and his confidence helps make the material easy to understand.</i>	<i>Should be given to anyone in a management position in a call center.</i>	<i>Tim is very personable and has great communication skills</i>
<i>Should be given to everyone in upper management</i>	<i>Great course. Really takes it back to the basics where the root of problems are.</i>	<i>Excellent presenter/presentation. Can definitely tell the level of experience is there.</i>
<i>Should be given to all service groups that haven't seen it yet</i>	<i>Tim was great! Really got us talking and thinking outside the box. I learned valuable skills that will help me with my agents. Thanks.</i>	<i>Very informative – should be training at the agent level.</i>
<i>This course has opened my eyes tremendously over the numerous things that I hadn't considered being a manager of a call center.</i>	<i>I would like my team leads to get this information as well as my boss.</i>	<i>Very beneficial way to remind ourselves to make things more simple</i>
<i>I learned more in three days than I have in months</i>	<i>I really took a lot away from this course. I realize there is a lot more to learn and am looking forward to learning it.</i>	<i>Fantastic. I wish I had had the opportunity to take this course 5 years ago. I learned so much – thank you, Tim.</i>
<i>Material was not over complicated like I think it could have been</i>	<i>This made me open up my mind and look at things different</i>	<i>Tim has outstanding presentation skills and is very energetic</i>
<i>Very informative and worth the time. Tim does what he does for a reason!</i>	<i>Made me want to burn down the house and rebuild</i>	<i>Tim Rocked!</i>
<i>This class should be given to every contact manager as they come into the organization</i>	<i>Gave me a better understanding of what it means to be a contact center manager</i>	<i>Best course I've had since starting here</i>
<i>Very nice job. I learned a lot, but I have even more questions. Time for research. Keep up the good work</i>	<i>Wow Tim is awesome. Needs to go to all of our call center leadership teams – from the CEO to the lowest front line leader</i>	<i>Really eye opening. So much valuable information. I really hope to see everything implemented. It would make a world of a difference.</i>