



# CUSTOMER EXPERIENCE STRATEGY AND TACTICS IN A PIVOTAL TIME



## CUSTOMER CONTACT WEST: A FROST & SULLIVAN EXECUTIVE MIND XCHANGE

Part of our 2019 International Customer Contact Executive MindXchange Series  
FEATURING THE CC AWARDS - REWARDING EXCELLENCE, CULTURE & TEAM SPIRIT

October 27 - 30, 2019  
Hyatt Regency Huntington Beach Resort and Spa  
Huntington Beach, California

 #FrostCC  
 [www.frost.com/linkedinCC](http://www.frost.com/linkedinCC)

## 5 REASONS WHY YOU MUST ATTEND

### 1 YOUR CUSTOMER IS YOUR TRUE NORTH

Every person, every process, every tool must embed the customer in its DNA. Ignore this at your peril.

### 2 YOUR WORKFORCE IS CHANGING

We are witnessing radical change in the workforce. You must be prepared to build a new vision and new strategy to engage with talent in the future.

### 3 TECHNOLOGY IS MOVING FAST

An era of unprecedented change is upon us, driven by the pace of digital technologies. Get a grip on a fast moving landscape of solutions and find innovative ways to provide data-driven customer support.

### 4 INSPIRE YOUR PEERS, COLLEAGUES AND YOUR INTELLECTUAL CURIOSITY

Our events are designed for you to open up most formidable challenges and forge lasting connections with your industry peers. Ultimately, you will leave the event feeling invigorated, inspired and ready to enact purposeful change.

### 5 YOU STILL HAVE TO BE "ALL THAT"

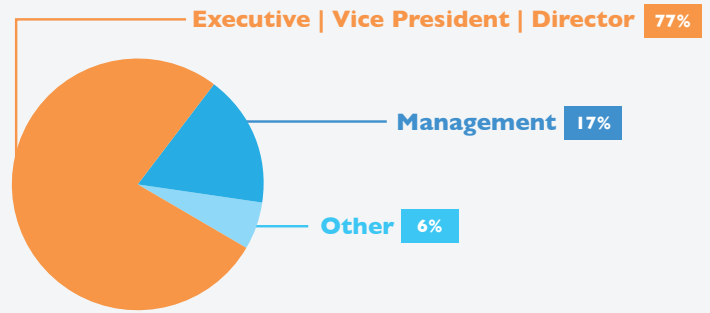
Amidst all the disruption, innovation, and consumer upheaval comes the unabated demand for operational efficiency and effectiveness. Plan for the "must have" people, process, and technology needed to meet the expectations placed on you by senior management.



### Hyatt Regency Huntington Beach Resort and Spa

Relax and rejuvenate your thinking in this magnificent oasis overlooking the Pacific Ocean. From surfing adventures to sipping cocktails at the lagoon-style pool, it's a perfect mix of business and pleasure.

## EXECUTIVE PROFILE / WHO WILL PARTICIPATE



Join our growing community of customer contact, customer experience, and operations executives seeking and sharing new ideas and creative approaches to common challenges. Network with Vice Presidents, Directors and Senior Managers of:

- Call Centers
- Contact Centers
- Customer Analytics
- Customer Care
- Customer Contact
- Customer Experience
- Customer Satisfaction and Loyalty
- Customer Service
- Customer Strategy
- Customer Support
- Operations
- Quality Assurance

\*please note this profile is based on past Executive MindXchange events.

## YOUR NEW FAVORITE EVENT

### COLLABORATE, COLLABORATE, COLLABORATE

Engage in strategic conversations with customer care and experience executives, guaranteed to generate new ideas!

### RELAX, HAVE FUN, AND MAKE NEW FRIENDS

Keep your contact list building and your engines revving while enjoying many unique networking events.

### FIND SOLUTIONS FAST

Be sure to sign up for a Frost & Sullivan Exclusive: Solutions Wheel! Collaborate speed date style with leading solution providers and discover who will help you address your business challenges - without a hard sales pitch.

### STAY AHEAD OF THE TECHNOLOGY CURVE

One-to-one personalized discussions will focus around new services that executives can take advantage of to meet the specific needs of their businesses.

### SEE FOR YOURSELF

Join us for a contact center site tour and get tangible examples of customer engagement excellence.

### CELEBRATE A SPIRIT OF EXCELLENCE

You will want to join us for The CC Awards, an unforgettable and fun twist to the usual formality of award ceremonies!

**+ 69 Net Promoter Score®**

Source: TechValidate Survey of Customer Contact Executive MindXchange Participants



**CUSTOMER CONTACT WEST  
EXECUTIVE MINDXCHANGE ADVISORY BOARD**

ANNIVERSARY

**An event shaped by a community of your peers!**



Frost & Sullivan extends its appreciation to the following Advisory Board Members for their expertise and valuable support in ensuring the agenda delivers relevant and valuable content.

**Ed Ariel**  
Vice President, Customer Service  
ezCater  
Customer Engagement  
Leadership Council Member

**Claudia Comtois**  
Assistant Vice President,  
Support Services  
Nationwide Financial  
Customer Engagement  
Leadership Council Member

**Matt Hayes**  
Principal Program Manager  
Microsoft  
Customer Engagement  
Leadership Council Member

**Eileen Lash**  
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Kaiser Permanente

**Steve Schneider**  
Executive Director, Service Operations  
Aetna Health Plans  
Customer Engagement  
Leadership Council Member

**Snapshot Of Companies Represented At  
Previous Executive MindXchange Events**






# SCHEDULE-AT-A-GLANCE

**DENOTES CONTENT SESSIONS**

**DENOTES NETWORKING EVENTS**

## CHOOSE BETWEEN SIX DIFFERENT COLLABORATION ZONES:

Customize your agenda! Stay the course with one zone or bounce around to others. All collaboration zones are Power-Point Free, participant-driven discussions featuring creative thinking and idea generation.

- Zone 1. Strategic Boardroom | Zone 2. Analytics in Action | Zone 3. Agents, Automation, and AI  
 Zone 4. Efficiency and Effectiveness in the Contact Center | Zone 5. The Integrated Customer Journey | Zone 6. Enhancing the Customer Experience

### SATURDAY, OCTOBER 26, 2019 | ARRIVAL DAY

#### 7:00pm Suggested Arrival Time

Arrive Saturday to participate in Sunday's Wine Tour & Tasting.

### SUNDAY, OCTOBER 27, 2019 | NETWORKING DAY

Bring plenty of business cards, relax, meet-and-greet during this fun-filled day devoted to making new contacts and new friends.

\*Please note Networking Day is open to all event participants and sponsors. See page 8 for details on the Council.

#### 10:00am Wine Tour & Tasting

#### 2:45pm Customer Engagement Leadership Council Mixer and Annual Meeting

\*Please note participation is restricted to Council Members only.

#### 3:15pm Sponsor Workshop

#### 4:45pm Sponsor Registration & Orientation Reception

#### 6:00pm Presenter & Thought Leader Orientation Meeting

#### 6:45pm Meet 'n' Greet

This end-user/practitioner networking activity is your opportunity to identify – right out of the gate – those peers who share challenges similar to your own. It's a great way to find participants who have thought leadership you can benefit from and to facilitate later dialogues throughout the event.

#### 7:30pm Welcome Networking Reception & Event Kickoff

### MONDAY, OCTOBER 28, 2019 | GENERAL SESSION AND EXHIBITION

#### 7:30am Registration, Continental Breakfast, and Exhibition

#### 8:15am WELCOME and HEADLINER – Leadership for the Digital Future

#### 9:10am Navigating the 15th Anniversary Customer Contact West: A Frost & Sullivan Executive MindXchange

#### 9:20am BEST PRACTICE – Building Out Your Tool Set

#### 9:50am Networking, Refreshment, and Exhibition Break

#### 10:20am CONCURRENT COLLABORATION ZONES – The Strategic Boardroom and Case Histories

Case Histories explore a specific use case and include informal conversations that draw upon the experience and expertise of the featured executive and participants. The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. *Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.* Choose **one** of the following zones:

Zone 1. Strategic Boardroom: Gaining **Top Down Support** for the Digital Future of Customer Care

Zone 2. Case History: Employee Experience – Leveraging Data to Drive Down **Employee Effort**

Zone 3. Case History: Omni Challenge – **Overcoming Legacy Mishmash** for Agent Experience and Productivity

Zone 4. Case History: Global **BPO Pricing Trends** and Models

Zone 5. Case History: Integrating **Mobile App Support** in the Customer Journey

Zone 6. Case History: **Measuring the Cross Channel** Customer Experience

#### 11:20am Session to Session Travel Time

#### 11:25am CONCURRENT SESSIONS –

Choose **one** of the following concurrent sessions:

#### INTERACTIVE – Solutions Wheel –

Play the “wheel” to find out which of the industry's products and services will help you solve your challenges. It is a series of rapid fire, one-on-one meetings with leading sponsors – both intense and fulfilling.

( OR )

#### FROST & SULLIVAN VISIONARY INSIGHT – Why People Must be a Critical Aspect of Every Digital Transformation

– FOLLOWED BY –

#### EXECUTIVE PRESENTATION – AI-Powered Automation for Voice and Chat Bots: Use Cases in the Contact Center

#### 12:40pm Food For Thought Luncheon – Networking Roundtables Hosted by Industry Leaders

Practitioners and solution providers host a menu of luncheon discussions on pertinent industry issues. Dine and dish with industry experts. The list of discussion topics will be available on-site.

#### 1:40pm Session to Session Travel Time

#### 1:45pm CONCURRENT COLLABORATION ZONES – The Strategic Boardroom and Roundtables

Roundtable sessions capture the power of all participants' voices, insights and experiences via group discussion and exploration of the issue at hand. The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. *Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.*

Choose **one** of the following zones:

Zone 1. Strategic Boardroom: Getting Ahead of the Game: **Early Adopter vs. Fast Follower**

Zone 2. Roundtable: Leveraging Data for **Customized Interactions**

Zone 3. Roundtable: 3 Things I Hate About My **CRM**

Zone 4. Roundtable: Connecting **VOC** with Operational Drivers

Zone 5. Roundtable: Cracking the Nut on **Omnichannel CX** – A Practical Guide and Key Considerations

Zone 6. Roundtable: **Employee Experience (EX)** – Unlocking a Better Customer Experience

#### 3:10pm Networking, Refreshment, and Exhibition Break



# SCHEDULE-AT-A-GLANCE

DENOTES CONTENT SESSIONS

DENOTES NETWORKING EVENTS

**MONDAY, OCTOBER 28, 2019 | GENERAL SESSION AND EXHIBITION**

**3:40pm CONCURRENT SESSIONS –**

Choose **one** of the following concurrent sessions:

**INTERACTIVE – Solutions Wheel –**

Play the “wheel” to find out which of the industry’s products and services will help you solve your challenges. It is a series of rapid fire, one-on-one meetings with leading sponsors – both intense and fulfilling.

( OR )

**THE FIX – Crowdsourcing Tactical Solutions to Our Most Vexing Challenges**

**4:55pm Session to Session Travel Time**

**5:00pm SUCCESS STORY – Creating a CX Task Force**

**5:27pm THE CC AWARDS – REWARDING EXCELLENCE, CULTURE & TEAM SPIRIT**

**6:00pm TRUTH OR DARE NETWORKING RECEPTION**

**TUESDAY, OCTOBER 29, 2019 | GENERAL SESSION AND EXHIBITION**

**6:45am Early Risers Run/Walk**

**6:45am Beach Yoga**

**8:00am Continental Breakfast and Exhibition**

**8:45am ICE BREAKER AND HEADLINER – Customer Trust and Its Enabling Technologies**

**9:45am Frost & Sullivan Customer Contact Executive MindXchange Advisory Board and Member Recognition**

**9:50am ASK THE EXPERTS! PANEL DISCUSSION – Socializing CX Across the Organization**

**10:40am Briefing Sessions, Networking, Refreshments, and Exhibition Break**

**11:25am CONCURRENT COLLABORATION ZONES – The Strategic Boardroom and Roundtables**

Roundtable sessions capture the power of all participants’ voices, insights and experiences via group discussion and exploration of the issue at hand.

The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. *Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.*

Choose **one** of the following zones:

Zone 1. Strategic Boardroom: Meeting the Unique Challenges of the **Enterprise Contact Center**

Zone 2. Roundtable: **STOP** Admiring the Problem – and **START** Driving **Real Value with Analytics**

Zone 3. Roundtable: **Integrating Conversational AI** into the Call Center Environment

Zone 4. Roundtable: Technology Integration: **Closing Operational Silos** at the Business Level

Zone 5. Roundtable: Delivering **Personalized Care** Across Channels

**12:25pm Food For Thought Luncheon – Networking Roundtables Hosted by Industry Leaders**

Practitioners and solution providers host a menu of luncheon discussions on pertinent industry issues. Dine and dish with industry experts. The list of discussion topics will be available on-site.

**1:30pm Session to Session Travel Time**

**1:35pm CONCURRENT COLLABORATION ZONES – The Strategic Boardroom and ThinkTanks**

ThinkTank sessions employ interactive team exercises in a “roll up your sleeves” learning environment.

The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. *Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.*

Choose **one** of the following zones:

Zone 1. Strategic Boardroom: **If I Only** Knew Then What I Know Now

Zone 2. ThinkTank: **Data Driven** Customer Experience

Zone 3. ThinkTank: **RPA** – Efficiency in Operations and Customer Experience

Zone 4. ThinkTank: Equipping Your Agents to Deliver **Proactive, End-to-End** Service

Zone 5. ThinkTank: Strategic Mapping of an **Integrated Self-Serve** Journey

**3:05pm Briefing Sessions, Networking, Refreshments, and Exhibition Break**

**3:50pm CONCURRENT COLLABORATION ZONES – Best Practices**

Best Practice sessions examine a real world use case, dissect the best practices employed, and explore how to apply them to your own initiative and company.

Choose **one** of the following zones:

Zone 1. Best Practice: Transitioning from **TBot to Live Chat**

Zone 2. Best Practice: Capture, Analyze, Optimize: Your **Employee Analytics Journey** from the Call Center Floor to the Boardroom

Zone 3. Best Practice: How **AI** is Helping to Create **Empowered and Efficient** Support Teams

Zone 4. Best Practice: Six Sigma: **Process Improvement** in the Contact Center

**4:50pm Session to Session Travel Time**

**4:55pm SUCCESS STORY – Join us for a Burst of Insight on:**

★ **Hiring for Staying Power and Brand Fit**

★ **Continuous Improvement of the Customer Experience**

**5:30pm General Session Concludes**

**6:00pm 15th ANNIVERSARY CUSTOMER CONTACT WILD WEST OLYMPICS & COOKOUT**

# SCHEDULE-AT-A-GLANCE

DENOTES CONTENT SESSIONS

DENOTES NETWORKING EVENTS

WEDNESDAY, OCTOBER 30, 2019 | GENERAL SESSION, EXHIBITION AND SITE TOUR

- 7:15am **Early Risers Yoga**
- 8:30am **Continental Breakfast and Exhibition**
- 9:10am **KICKOFF AND HEADLINER – Embracing the Workforce of the Future**
- 9:55am **EXECUTIVE INSIGHT – Mapping Root Cause for Proactive Solutions**
- 10:25am **Networking, Refreshment, and Exhibition Break**
- 10:55am **SUCCESS STORY – Customer Experience Measurement**
- 11:25am **INSIGHTS AND IDEAS ROUNDUP – The Great Take-Away: Implementing the Best, Brightest and Boldest Ideas from the Program**
- 12:00pm **CONTENT FOR THE 15TH ANNIVERSARY CUSTOMER CONTACT WEST CONCLUDES**

**BANK OF AMERICA CONTACT CENTER TOUR AND EXECUTIVE ROUNDTABLE**

- 1:00pm **BANK OF AMERICA SITE TOUR – Shuttle Check In. Lunch will be provided.**
- 3:30pm **CUSTOMER ENGAGEMENT LEADERSHIP COUNCIL EXECUTIVE ROUNDTABLE**
- 4:30pm **SITE TOUR AND EXECUTIVE ROUNDTABLE CONCLUDE – Shuttle Transportation to Huntington Beach Resort & Spa Provided.**

“I can’t stop talking about the **value to me this event provided**, all the way up to my CEO!” – Vice President, Customer Experience, AMEREN MISSOURI | “Robust!” – First Vice President, Director of Customer Contact Center, BIG LOTS | “I have been to several Frost & Sullivan events and I ALWAYS come back to work **energized with many different ideas to try** to better my contact center and teams.” –Vice President, Call Center Operations & Customer Care, PLEASANT HOLIDAYS, LLC| “High value, focused, **collaboration and co-creation** to solve problems and grow business.” – CX Innovator, VERIZON COMMUNICATIONS INC. | “...The networking opportunities allow me the chance to interact with my peers, share common issues and solutions and **contact group.** In the past, I have turned to this group for solutions to issues and they have responded positively, and I would not hesitate to do the same for someone else.” – Manager, Customer Service Operations, EMPIRE TODAY | “Good exposure to **real world solutions.**” –Vice President, Contact Center Services, MAXIMUS INC. | **"WOW - The best** I have ever attended!” –Vice President, Contact Center Solutions, J. KNIPPER COMPANY | “One of the **most effective and essential** events I have participated in.” –Vice President, Enterprise Contact Center, ST JUDE CHILDREN'S RESEARCH HOSPITAL | “Excellent networking opportunities and a great platform for introduction to new technologies and views.” –Technology Manager, SCHNEIDER ELECTRIC | “I have material from this event that I will use to present to my leadership team!” –Vice President, Customer Care, Xplornet Communications | “Many of the sessions were exactly what we were hoping for. The networking is a huge advantage for side conversations.” –Manager, Customer Relationship Center, UBISOFT



**98% of participants would recommend this event to a colleague and/or industry peer.**



## GROUP PACKAGES

100% of surveyed participants recommended sending 2 or MORE executives! Contact us today to learn about the savings and benefits you can receive and be sure to ask about our **Team Experience Program.**

For more information, please email: [events.us@frost.com](mailto:events.us@frost.com)

# MAXIMIZE YOUR NETWORKING

Sunday, October 27, 2019

**Wine Tour & Tasting**  
10:00am

Napa and Sonoma are not the only two areas of California that can produce some amazing wine. Kick off Customer Contact West by joining your peers on a very chill wine tour & tasting around Southern California. We'll learn about different types of wine and get a chance to pair flavorful bites with delicate, fresh wines and bold barrel-aged blends. Build relationships and cap off this networking activity with a gourmet lunch fit for the VIP you are!  
Sign up today as space is limited.

Hosted by: **SmartAction**  
Automating Customer Service. Intelligently.



**Participant Fee: \$50.00**

**Participant Meet 'n' Greet**  
6:45pm



This end-user/practitioner networking activity is your opportunity to identify – right out of the gate – those peers who share challenges similar to your own. It's a great way to find participants who have thought leadership you can benefit from and to facilitate later dialogues throughout the event.

**Welcome Networking Reception & Event Kickoff**  
7:30pm

Meet your fellow peers and colleagues as we engage in an ice breaker over cocktails to get the conversations started and set you up for an event whose foundation is built on collaboration.

Hosted by: **ptp** experience transformation

**DATAMARK**  
INCORPORATED



Monday, October 28, 2019

**The CC Awards**  
5:27pm



Let's kick off the evening with a bang! Come join us as we unveil and celebrate the winners of the CC Awards. These dynamic and forward-looking candidates are pushing the envelope in AI, analytics, omnichannel customer service and web customer care, and we'll be toasting them with a reception worthy of their achievements (and awesomeness!).

**Truth or Dare Networking Reception**  
6:00pm

Will you choose Truth... or Dare? Network, mix and mingle while playing the classic game of truth or dare. All who play will be entered to win a fabulous prize!



Tuesday, October 29, 2019

**Early Risers Run/Walk**  
6:45am



Calling all walkers, joggers and runners! Lace up your sneakers and get your endorphins flowing with a little exercise. It's the perfect start to a great day of content and networking!

**OR**  
**Beach Yoga**  
6:45am

Calling all yogis! Get energized while building strength and flexibility with us. This upbeat, creative yoga practice, will link breath and movement to keep you present and centered.



**15th Anniversary Customer Contact Wild West Olympics & Cookout**  
6:00pm



Gear up for a night of Olympic games with Western flair. Dinner will be served throughout the night and our top teams will be draped in Gold, Silver & Bronze, YEEHAW! Saddle up and show us your wild west side!

Wednesday, October 30, 2019

**Beach Yoga**  
7:15am

Calling all yogis! Get energized while building strength and flexibility with us. This upbeat, creative yoga practice, will link breath and movement to keep you present and centered.



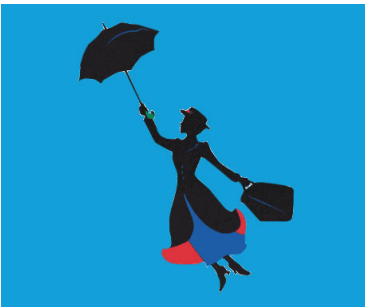




# Rewarding Excellence, Culture & Team Spirit



Artificial Intelligence



Self Serve



Analytics



Process Automation



Social Media



Show Us Your Culture and  
Team Spirit!

## Who are the Candidates?

Any company that is engaged in the goal of delivering a superior customer experience is encouraged to nominate itself for accomplishments in any or multiple categories. Particular attention will be given to companies whose achievements have enabled them to set themselves apart from their competitors and that have delivered compelling value to their customers and the enterprise as a whole. *Please Note: Service Providers may nominate themselves for the Work Hard, Play Hard award; all other categories are practitioner only.*

**CC Award Winners will be honored at the  
15th Anniversary Customer Contact West:  
A Frost & Sullivan Executive MindXchange,  
October 27 – 30 in Huntington Beach, California.**



# AGENDA

## Saturday, October 26, 2019 | Arrival Day

### 7:00pm Suggested Arrival Time

Arrive Saturday to participate in Sunday's Wine Tour & Tasting.

## Sunday, October 27, 2019 | Networking Day

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Hosted by:



### 2:45pm Customer Engagement Leadership Council Mixer and Annual Meeting



Customer Engagement  
Leadership Council  
FROST & SULLIVAN

Members of the Council discuss and debate the challenges and opportunities that they face, and agree upon key Critical Issues. These Critical Issues will then be put forth to the membership at large for a vote on the most relevant areas of interest. The top Critical Issues then serve as the foundation for the content of both the Council's live events, virtual events, and curated thought leadership throughout 2020.

\*Please note participation is restricted to Council Members only.

### 3:15pm Sponsor Workshop

### 4:45pm Sponsor Registration & Orientation Reception

### 6:00pm Presenter & Thought Leader Orientation Meeting

An essential meeting for speakers, facilitators, and confirmed thought leaders to preview the event, highlight your roles, and network with fellow peers.

### 6:45pm Meet 'n' Greet

This end-user/practitioner networking activity is your opportunity to identify – right out of the gate – those peers who share challenges similar to your own. It's a great way to find participants who have thought leadership you can benefit from and to facilitate later dialogues throughout the event.

### 7:30pm Welcome Networking Reception & Event Kickoff

Meet your fellow peers and colleagues as we engage in an ice breaker over cocktails to get the conversations started and set you up for an event whose foundation is built on collaboration.

Hosted by:



# AGENDA

Monday, October 28, 2019 | GENERAL SESSION AND EXHIBITION

**7:30am Registration, Continental Breakfast, and Exhibition**

Registration Items  
Hosted by:



Featured Demonstration  
Hosted by: **aceyus**

**8:15am WELCOME AND HEADLINER – Leadership for the Digital Future**

**Gary Magenta**  
Senior Vice President, Customer Experience  
Root

**Bridget Stallkamp**  
Vice President, Root Insights  
Root

**SESSION ABSTRACT:** The only constant in today’s workplace is change, and much of what’s required to evolve means new tools and technology, as well as adopting the mindset of a disruptor. All change is hard - that’s human nature - and it rarely sticks. But leaders have a unique responsibility to help their people embrace it. Successful change means breaking free from traditional employee communication and engagement approaches. It means breaking free from the one viewpoint you’re comfortable with and getting used to thinking about things holistically. Businesses need to think like customers - and leaders need to consider things from the frontline perspective. The time for changing our behaviors, and our mindsets, is here. Leaders must tell their people a story, paint them a picture that shows where the company is headed and how each person helps make that happen.

**KEY TAKE-AWAYS:**

- Guide to the “why” behind change in order to help people develop a change mindset that resonates both emotionally and intellectually
- Best practices for engaging people in translating change from a concept to reality through successful storytelling
- Strategies and tactics for getting clear on your desired change including understanding common organizational “canyons” that cause disconnects at the leader, manager and individual contributor levels; building an organizational movement around that change; and sustaining it for long-term results

**9:10am Navigating the 15th Anniversary Customer Contact West: A Frost & Sullivan Executive MindXchange**

**9:20am BEST PRACTICE – Building Out Your Tool Set**

**Nate Brown**  
Head of Customer Experience  
UL EHS

**SESSION ABSTRACT:** The role of the contact center agent is harder today than it has ever been. Transactional volume has declined drastically, leaving those tricky tickets which require a vast array of skills. The solution for many centers has been the implementation of new technologies to supplement the abilities of the agent and to try and make their lives easier. Sadly, as has been the case with the majority of digital transformation projects, many of these tools have failed to bring the desired results. How can we ensure that the technology we bring into our organizations will help rather than hinder?

**KEY TAKE-AWAYS:**

- Transparent guide into the agent impact of new technology implementations, the good and the bad
- Framework to strategically identify a gap in the contact center toolset
- Best practices for adopting a holistic mindset to ensure the tools of the contact center fit into the larger organization for optimal exchange of knowledge and an enhanced customer experience

**9:50am Networking, Refreshment, and Exhibition Break**

Featured Demonstration  
Hosted by:



# AGENDA

## CHOOSE BETWEEN SIX DIFFERENT COLLABORATION ZONES:

Customize your agenda! Stay the course with one zone or bounce around to others. All collaboration zones are Power-Point Free, participant-driven discussions featuring creative thinking and idea generation.

Zone 1. Strategic Boardroom | Zone 2. Analytics in Action | Zone 3. Agents, Automation, and AI  
 Zone 4. Efficiency and Effectiveness in the Contact Center | Zone 5. The Integrated Customer Journey | Zone 6. Enhancing the Customer Experience

### 10:20am CONCURRENT COLLABORATION ZONES – The Strategic Boardroom and Case Histories

*Case Histories explore a specific use case and include informal conversations that draw upon the experience and expertise of the featured executive and participants.*

*The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.*

Choose one of the following zones:

#### Zone 1. Strategic Boardroom: Gaining Top Down Support for the Digital Future of Customer Care

##### CO-FACILITATORS:

##### Gary Magenta

Senior Vice President, Customer Experience  
 Root

##### Bridget Stallkamp

Vice President, Root Insights  
 Root

**SESSION ABSTRACT:** This dynamic workshop allows everyone in the room to start thinking and talking about what companies need to do to survive and thrive in the future. Using guided dialogue and visualization, and imagining themselves as customer experience radicals, the audience works in small groups to take a hard look at their current state and the future they could create through that lens.

##### KEY TAKE-AWAYS:

- Insight on changing consumer expectations, technology, and competitive trends and what they mean for the future of business
- Opportunities to radicalize customer experiences in your own industry and the potential barriers to change
- Guide to the changing customer experience trends could have on your customers and your industry
- Potential outcomes of leading the way or reacting to changes made by your competitors

#### Zone 2. Case History: Employee Experience – Leveraging Data to Drive Down Employee Effort

##### FACILITATOR:

##### Neil Crane

Vice President, IT and Product  
 Cicero

**SESSION ABSTRACT:** Employee Effort has an impact of cost and the customer experience. The ability to quantify that cost of impact helps drive a business case for change. Come learn how forward-thinking practitioners are using new data points, tools and techniques to cast new light on existing KPIs.

##### KEY TAKE-AWAYS:

- Insight on the metrics that matter - where are the gaps in traditional measures as they effect employee effort and experience
- Guide to why all the data matters ... use corroborating sources to guard against misinformed analysis; watch out for patterns that reveal lowest common denominator rather than best practice by majority
- Blueprint of how are the benefits realized by the business, IT and the customer - focus on application of the data; what are the planned outcomes for IT, business, employee & customer



Monday, October 28, 2019

# AGENDA

## Zone 3. Case History: Omni Challenge – Overcoming Legacy Mishmash for Agent Experience and Productivity

### CASE HISTORY WITH:

**Anthony Banks**

Senior Manager, Operations  
Allstate Roadside Services

### FACILITATOR:

**Matthew Storm**

Vice President, Global Marketing  
Jacada

**SESSION ABSTRACT:** Allstate, a Fortune 100 Insurance provider, was receiving millions of calls that should have been self-served via a variety of self-service tools available to their customers. In 12 weeks, Allstate was able to automatically pivot callers directly into a self-service experience that combined voice and visual assistance to guide users to their desired resolution. To drive efficiency and speed into interactions, agents received full visibility into the customer journey and instant access to the right information and processes. Join this session to find out how Allstate was able to drastically reduce inbound call volume and drive digital adoption, while improving employee and customer experience.

### KEY TAKE-AWAYS:

- Guide to leveraging your existing digital assets to drive adoption rates
- Insight on how to use multimodal assistance to guide your customers to drive self-service success
- Reasons for abandonment in the self-service journey and derive mechanisms for continuous improvement and experimentation
- Blueprint for providing seamless connectivity and contextual handoff from self-service to a live agent when live assistance is required
- Best practices for providing a clutter-free experience for agents with full visibility into the customer journey to shorten average handling time and improve CX

## Zone 4. Case History: Global BPO Pricing Trends and Models

### FACILITATOR:

**Corey Kotlarz**

Chief Executive Officer  
Outsource Consultants

**SESSION ABSTRACT:** Are you battling growing call center expenses? You're not alone. Low US unemployment rates are causing a ripple effect on BPO costs worldwide and complicating the market. Discover the reasons behind this trend and learn how to find a BPO partner that saves money without sacrificing service.

### KEY TAKE-AWAYS:

- Guide to how unemployment rates in the US and Canada are impacting call center agent costs both domestically and abroad
- Insights on evaluating market maturity in foreign call center industries and the corresponding effect on pricing
- Key concepts to selecting a nearshore or offshore outsource call center or BPO partner that will provide the best value for the cost

## Zone 5. Case History: Integrating Mobile App Support in the Customer Journey

### FACILITATOR:

**Samantha Pang**

Director of Customer Success  
Helpshift

**SESSION ABSTRACT:** When it comes to supporting your customers in the digital age, mobile customer service should not be an afterthought. Today's customers are on-the-go, and they expect customer service that is quick, convenient and effortless. The best way to deliver on these expectations is by providing messaging right within your brand's mobile app.

### KEY TAKE-AWAYS:

- Blueprint for getting started with in-app messaging, and optimizing for the best customer experience
- Tools and tactics for increased mobile app retention (while reducing cost to serve)
- Real-world examples of brands that successfully utilize messaging with automation for improved CSAT

# AGENDA

## Zone 6. Case History: Measuring the Cross Channel Customer Experience

**CASE HISTORY WITH:**

**Michael Zurat**

Director, Engagement Solutions  
Cognosante

**FACILITATOR:**

**Mark Hertel**

Regional Vice President  
Talkdesk

**SESSION ABSTRACT:** With the proliferation of customer interaction channels it's more important than ever for contact center leaders to track and measure the customer experience across channels. Despite the promise of a unified omnichannel experience, channel silos still pervade.

**KEY TAKE-AWAYS:**

- Best practices for ensuring each channel delivers a consistent high quality, secure experience to ensure a trusted relationship
- Guide to making the customer journey across channels unified and seamless
- Tricks and tips for tapping into customer sentiment to optimize the customer experience

**11:20am Session-to-Session Travel Time**

**11:25am CONCURRENT SESSIONS –**

Choose one of the following concurrent sessions:

**INTERACTIVE – SOLUTIONS WHEEL –**

Play the “wheel” to find out which of the industry’s products and services will help you solve your challenges. It is a series of rapid fire, one-on-one meetings with leading sponsors – both intense and fulfilling.  
(OR)

**FROST & SULLIVAN VISIONARY INSIGHT – Why People Must be a Critical Aspect of Every Digital Transformation**

**Alpa Shah**

Vice President, Digital Transformation  
Frost & Sullivan

**SESSION ABSTRACT:** People, processes and technologies have long been the key elements of a CRM strategy. As 99% of businesses are now in some stage of digital transformation, the people aspect is the most important, and best place to start. Customers and employees play a key role in a company’s success. Investing in emerging technologies and updating dated processes to serve their needs can be the way to gain a competitive edge.

**KEY TAKE-AWAYS:**

- Data from Frost & Sullivan research that proves why your company needs to invest in CEX
- Guide to how workforce engagement is helping to solve one of the biggest and ongoing customer contact challenges - improving employee retention
- Discover the pitfalls of investing in technologies before understanding “people”

– FOLLOWED BY –

**EXECUTIVE PRESENTATION – AI-Powered Automation for Voice and Chat Bots: Use Cases in the Contact Center**  
**Aarde Cosseboom**

Senior Director of GMS Technology, Analytics, and Product  
TechStyle Fashion Group

**SESSION ABSTRACT:** Join this real-world use case of how AI-powered Automation is rapidly becoming a must-have contact center Self Service tool for driving better customer experiences, and how organizations have successfully implemented these technologies by driving user adoption, attaining valuable insights, and avoiding common pitfalls.

**KEY TAKE-AWAYS:**

- Guide to the self-service options with advanced natural language capabilities
- Case history of TechStyle’s timeline of self-service implementation, including chatbots, social media, and planned applications
- Best practices for reducing non-revenue generating calls to live agents, offsetting volume spikes associated with subscription billing, and leveraging automation capabilities without sacrificing customer experience

# AGENDA

**12:40pm Food For Thought Luncheon – Networking Roundtables Hosted by Industry Leaders**

Practitioners and solution providers host a menu of luncheon discussions on pertinent industry issues. Dine and dish with industry experts. The list of discussion topics will be available on-site.

Hosted by:



**1:40pm Session to Session Travel Time**

**1:45pm CONCURRENT COLLABORATION ZONES – The Strategic Boardroom and Roundtables**

Roundtable sessions capture the power of all participants’ voices, insights and experiences via group discussion and exploration of the issue at hand.

The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.

Choose one of the following zones:

**Zone 1. Strategic Boardroom: Getting Ahead of the Game: Early Adopter vs. Fast Follower**

**FACILITATOR:**

**Gabriele Masili**

Chief Technology Officer, Customer Service and Support  
Microsoft

**SESSION ABSTRACT:** Artificial intelligent is disrupting the customer service and support space. Are you looking to better understand the value of embracing AI-powered digital solutions? Are you struggling with where to start and how to prioritize your CX projects? This interactive session will arm you with best practices and lessons learned to accelerate your digital transformation and enrich your customer support experience.

**KEY TAKE-AWAYS:**

- Best practices for getting started with AI-powered digital solutions, like virtual agents and machine learning to solve customer issues
- Techniques for prioritizing your CX projects
- Framework for how to get stakeholders onboard and engaged

**Zone 2. Roundtable: Leveraging Data for Customized Interactions**

**FACILITATOR:**

**Tony Iero**

General Manager, Digital Solutions  
VHT

**SESSION ABSTRACT:** Research shows 56% of CEOs said digital improvements have led to revenue growth and more than 40% of all data analytics projects will relate to customer experience by 2020. In this interactive session, we’ll uncover how your customer data can impact positive custom interactions with your customers. Interactions your customers expect to be effortless and seamless.

**KEY TAKE-AWAYS:**

- Insight on how to use data to provide a more complete understanding of your customers
- Best practices for eliminating digital dead ends and provide an effortless experience
- Guide to encouraging lasting relationships with your customers



# AGENDA

## Zone 3. Roundtable: 3 Things I Hate About My CRM

**CO-FACILITATORS:**

**Fred Lee**  
 Chief Technology Officer  
 Cars.com

**Lynn Olson**  
 Vice President, Customer Experience  
 PTP

**SESSION ABSTRACT:** Ok. Let's get real for a minute. Does anyone love their CRM? I don't. Let's talk about the top three reasons I hate my CRM. Customer experience should be the top priority. Yet, we constantly make it about the CRM. Everyone agrees that providing great CX is an important competency. Since when did we start equating CRM with great customer experience? This session is for you if you are fed up with making the CRM the priority. Join me in the revolution!

**KEY TAKE-AWAYS:**

- Insight on why having a customer experience strategy and vision is most important
- Examples of why customers don't care about your CRM
- Blueprint of how CRM is the tool; not the strategy

## Zone 4. Roundtable: Connecting VOC with Operational Drivers

**FACILITATOR:**

**Sandy Ellis**  
 Global Vice President  
 Sitel

**SESSION ABSTRACT:** This interactive session will enable participants to capture proven strategies designed to interweave the customer voice within the service delivery framework. Leaders will leave this session with a roadmap containing actionable strategies to design, plan and execute key elements that are tailored and aligned to achieving company objectives while harnessing the power of your greatest source of information; your customers. Your individual plan will enable you to immediately begin working toward creating an optimized service environment based on a sustainable continuous improvement culture that facilitates and rewards service excellence.

**KEY TAKE-AWAYS:**

- Sound tactics to navigate through barriers such as 'paralysis by analysis', limited resources (dollars and people), conflicting priorities, among others
- Strategies that apply across industries
- Best practices for utilizing a collaborative approach to build a network of champions while gaining positive momentum
- Personalized roadmap based on the STAR model; Strategy, Structure, Processes, Rewards and People

## Zone 5. Roundtable: Cracking the Nut on Omnichannel CX – A Practical Guide and Key Considerations

**FACILITATOR:**

**Rob McDougall**  
 Chief Executive Officer  
 Upstream Works

**SESSION ABSTRACT:** Omnichannel is getting a bad rap as the latest panacea for everything that's wrong in the contact center. As a result, its potential to provide real business and consumer benefits isn't being realized. As the cornerstone of your organization's digital strategy, your omnichannel approach will need help in order to fly. Let's boil it down to the basics and figure out how to ensure that you can offer your customers the choice they want within a scope you can implement.

**KEY TAKE-AWAYS:**

- Key elements of a successful omnichannel implementation
- Best practices for overcoming implementation obstacles and avoiding common pitfalls
- Insights and practical guidance on how to derive the most benefit from your solution

# AGENDA

## Zone 6. Roundtable: Employee Experience (EX) – Unlocking a Better Customer Experience

**CO-FACILITATORS:**

**Jacob Britt**

Senior Manager, Business Development  
Aceyus

**Sharon Bradbury**

Experience Manager, Customer Service  
& Support - Tools & Technology  
Microsoft

**SESSION ABSTRACT:** In today's digital world a growing number of organizations are laser focused on Customer Experience (CX) as a way to drive improved profits and market share. Unfortunately, many have underestimated the impact that Employee Experience (EX) plays in delivering a memorable Customer Experience. As companies continue to add and embrace new digital channels the role of the Agent is becoming more critical and will have profound effects on company culture, employee engagement and bottom-line profitability.

**KEY TAKE-AWAYS:**

- Insight into the key transactional and psychological issues that are directly impacting your employees (i.e. addressing the complicated problems employees deal with every day)
- Pitfalls of increased focus on technology growth and improved CX at the expense of addressing the needs of employees/agents (EX)
- Gain a realistic perspective of your company's experiences based on the understanding of expectations and perceptions
- Proven ways to leverage analytics and track the metrics needed to identify, balance and improve both CX and EX

**3:10pm Networking, Refreshment, and Exhibition Break**

**Featured Demonstration**

**Hosted by:**



**servicenow GRAND PRIZE GIVEAWAY** Fill out the entry form in your event padfolio on-site!



**Monday Prize Drawing:**  
At the beginning of the 5:00pm general session.



**Tuesday Prize Drawing:**  
At the conclusion of the networking lunch.



**Wednesday Prize Drawing:**  
At the beginning of the 11:25am general session.

**\*Must be handed in to a ServiceNow executive by Monday at 5:00pm.**

\*Grand Prize is limited to end users/practitioners only and never expires. If you are unable to accept this prize, we encourage you to donate it to a charity of your choice. Sponsors, vendors, media, non practitioners excluded in all instances. Winners do not need to be present to win.

## What Inspired You?

“The transparency of participants to share challenges & solutions.”

“Sense of community. Great connections made!”

“Conversations were natural and the relationships really built over the 3 days.”



“The passion of participants, guests and the Frost & Sullivan team.”

“I loved the inspire pins!”

“Great insights from the speakers with actionable takeaways. This event re-energized me!”

# AGENDA

3:40pm

**CONCURRENT SESSIONS –**

Choose one of the following concurrent sessions:

**INTERACTIVE – SOLUTIONS WHEEL –**

Play the “wheel” to find out which of the industry’s products and services will help you solve your challenges. It is a series of rapid fire, one-on-one meetings with leading sponsors – both intense and fulfilling.  
(OR)

**THE FIX – Crowdsourcing Tactical Solutions to Our Most Vexing Challenges**

Share your smarts! Choose between eight themed brainstorming sessions and crowd source solutions to the most vexing challenges facing customer experience and customer contact today. These are twenty minute rapid fire sessions with four rotations. First come, first serve, so choose wisely! Each brainstorm group will build upon the other to build a list of readily operationalized ideas to these common challenges.

**THE FIX on Revitalizing Surveys**

Hosted By: Sylvain Jette, *Assistant Vice President, Customer Experience*, **Geotab**

**THE FIX on Migrating to the Cloud**

Hosted By: Aarde Cosseboom, *Senior Director, GMS Technology & Product*, **TechStyle**

**THE FIX on Making B2B CX Personal**

Hosted By: Steven Carleton, *Vice President, Customer Experience*, **Premera Blue Cross**

**THE FIX on Small Contact Centers**

Hosted By: Mari Urrea, *Contact Center Manager*, **Clark Pest Control**

**THE FIX on Handling Social Media Detractors**

Hosted By: Jen Staben, *Head of Customer Success*, **Shift**

**THE FIX on Regulated Industries**

Hosted By: Jim LeMere, *Vice President Client Services*, **Northwestern Mutual**

**THE FIX on Preparing for Catastrophic Events**

Hosted By: Regan Heckethorn, *Vice President, Operations*, **Allegiant Air**

**THE FIX on Workforce Optimization**

4:55pm

**Session-to-Session Travel Time**

5:00pm

**SUCCESS STORY – Creating a CX Task Force**

**Teddi Burress**

*Senior Consultant, Customer Experience*  
Nationwide

**SESSION ABSTRACT:** In an organization of any size, it can be challenging to operationalize the customer experience mindset. Many, if not most companies know that customer experience is a critical part to their competitive advantage in today’s marketplace, but where should you start and how do you weave it into the strategic focus of an organization?

**KEY TAKE-AWAYS:**

- Insight into how to gain buy-in into the importance of customer experience in an organization and influence change
- Examples of how to bring together key partners from across the organization to drive the experience strategy and eliminate barriers
- Guidelines of how to incorporate customer experience into all organizational decisions

5:27pm



**THE CC AWARDS – REWARDING EXCELLENCE, CULTURE AND TEAM SPIRIT**

Let’s kick off the evening with a bang! These forward-looking candidates are pushing the envelope in AI, analytics, self-serve, social media and robotic process automation, and we’ll be toasting them with a reception worthy of their achievements (and awesomeness!)



6:00pm



**Truth or Dare Networking Reception**

Will you choose Truth... or Dare? Network, mix and mingle while playing the classic game of truth or dare. All who play will be entered to win a fabulous prize!



# AGENDA

**Tuesday, October 29, 2019 | GENERAL SESSION, EXHIBITION**

**6:45am Early Risers Run/Walk**

Calling all walkers, joggers and runners! Lace up your sneakers and get your endorphins flowing with a little exercise. It's the perfect start to a great day of content and networking!  
OR

**6:45am Beach Yoga**

Calling all yogis! Get energized while building strength and flexibility with us. This upbeat, creative yoga practice, will link breath and movement to keep you present and centered.

**8:00am Continental Breakfast and Exhibition**

**Featured Demonstration**

Hosted by:



**8:45am ICE BREAKER AND HEADLINER – Customer Trust and Its Enabling Technologies**

**Kandy White**

Senior Vice President, Operations  
Altisource

**SESSION ABSTRACT:** Trust and credibility are foundational to every brand's success, yet the data tells us that consumer trust is at an all-time low. Brands must work to earn trust by treating every interaction as an opportunity to build the customer relationship and nurture confidence. This session will help you discover key factors in building and fostering your customer's trust.

**KEY TAKE-AWAYS:**

- Guide to the understanding interactions across the key pillars of brand trust, satisfaction, loyalty, and word of mouth
- Insight on how industry and demographics influence the meaning of "trust" for a brand
- Best practices for enabling trust and incorporating consent for automated service technology, biometrics, and AI
- Real world examples of building and recovering trust through leveraging traditional and social media

**9:45am Frost & Sullivan Customer Contact Executive MindXchange Advisory Board and Member Recognition**

**9:50am ASK THE EXPERTS! PANEL DISCUSSION – Socializing CX Across the Organization**

**MODERATOR:**

**Nate Brown**

Head of Customer Experience  
UL EHS

**PANELISTS INCLUDE:**

**TS Balaji**

Vice President, User Experience  
Cox Communications

**Matt Beckwith**

Director, Customer Service  
Clark Pest Control

**Teddi Burress**

Senior Consultant, Customer Experience  
Nationwide

**Jerry Leisure**

Chief Executive Officer  
Officium Labs

**Brian Martin**

Director, Contact Center  
ResortCom

**Gabriele Masili**

Chief Technology Officer, Customer Service and Support  
Microsoft

**SESSION ABSTRACT:** Customer experience no longer lives in a vacuum. More than ever, organizations need to weave the customer experience into every department, breaking down silos and making customer centricity part of the company's DNA. This panel discussion will unpack the best practices for bringing a customer-first organization to life.

**KEY TAKE-AWAYS:**

- Best practices for making the contact center the driving force for inspiring a CX mentality across the enterprise
- Tips and tricks for demonstrating value and influencing other departments
- Insights from members of cross-functional CX committees and how you can partner with other functional areas to drive change



# AGENDA

**10:40am Briefing Sessions, Networking, Refreshment and Exhibition Break**

**Featured Demonstration**

Hosted by:



**11:25am CONCURRENT COLLABORATION ZONES – The Strategic Boardroom and Roundtables**

Roundtable sessions are participant-driven discussions focusing on your key challenges and concerns.

The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.

Choose one of the following zones:

**Zone 1. Strategic Boardroom: Meeting the Unique Challenges of the Enterprise Contact Center**

**MODERATOR:**

**Jared Benesh**

Executive Director, Product

Quicken Loans

Customer Engagement Leadership Council Member

**SESSION ABSTRACT:** Contact centers are complex with many stakeholders, many opinions, many objectives – in this session you will gain tools for deploying a strategy for gaining alignment for major transformations across organizational units.

**KEY TAKE-AWAYS:**

- Learn how to deploy a data driven decisioning model to remove bias from disparate organizational biases
- Blueprint of strategies for leveraging data to drive change to overcome transformational adversity
- Tips for gaining buy in more creative way – program branding

**Zone 2. Roundtable: STOP Admiring the Problem – and START Driving Real Value with Analytics**

**FACILITATOR:**

**Paul Ignasinski**

Senior Vice President, CX & Digital Transformation Consulting

TTEC Digital

**SESSION ABSTRACT:** Your customer journeys – from your online experience to your customer care operations – are awash with data and valuable information about customer experiences, employee performance, and internal operations is likely hidden in plain sight. While most leaders understand the need to turn this data into actionable insight, actually doing it remains a challenge. Join us to discuss ways to be pragmatic about the use of analytics to focus on the right areas and drive measurable impact for both customers and your business.

**KEY TAKE-AWAYS:**

- Insight on where to prioritize analytical efforts
- Guide to integrating data from many sources to create a holistic picture
- Tips and tricks for overcoming common barriers to success in the use of analytics
- Best practices to reduce costs and drive revenue

# AGENDA

## Zone 3. Roundtable: Integrating Conversational AI into the Call Center Environment

**CO-FACILITATORS:**

**Brian Morin**  
 Chief Marketing Officer  
 SmartAction

**Tiffany Anderson**  
 Director of CX Process/Initiatives  
 Purchasing Power

**SESSION ABSTRACT:** So you're looking to implement virtual agents to automate more calls and chats? There's just one problem: it's hard. Join this interactive session where Purchasing Power's Chris Gillen will detail the nitty-gritty on how to integrate conversational AI into the call center flow.

**KEY TAKE-AWAYS:**

- Step by step process for conversational AI self-service implementation
- Insights from a contact center leader who's already done it and proven success
- A plan for your contact center to introduce AI automation in the next six months

## Zone 4. Roundtable: Technology Integration: Closing Operational Silos at the Business Level

**FACILITATOR:**

**Will McLaughlin**  
 Senior Manager Solution Leads, North America  
 Genesys

**SESSION ABSTRACT:** What is your current business strategy, are you outwardly focused on customer outcomes or inwardly focused on your organization's needs? Most organizations are inwardly focused. This creates silos for both their customers and employees. To break down these silos requires a different way of doing business.

**KEY TAKE-AWAYS:**

- Guide to avoiding the pitfalls of exposing your operational silos to your customers
- Insight on how to budget, plan and spend – align sales, marketing and delivery
- Lessons learned on how the employee experience supports the end to end customer cycle
- Best practices to break down the silos, from companies including Telus, UPMC and United Health Group

## Zone 5. Roundtable: Delivering Personalized Care Across Channels

**FACILITATOR:**

**Michael Kropidowski**  
 Director Product Marketing  
 Aspect

**SESSION ABSTRACT:** It's more important than ever to keep in touch with customers and help them resolve issues before they become a problem. Many companies don't make it easy for customers to respond when they receive a notification and want to take immediate action. At the same time, channel preferences are changing for both companies and their customers – for instance, customer preference for text-based channels is increasing, and companies benefit with over 90% of SMS messages reach their intended recipient within 3 minutes.

**KEY TAKE-AWAYS:**

- Strategies for turning one-way notifications into two-way conversations
- Best practices in proactive outreach that can keep customers engaged, informed and on schedule – whether for appointments, bill payments, or other events and activities
- Insights on channel preferences for both companies and their customers

Tuesday, October 29, 2019

## AGENDA

**12:25pm Food For Thought Luncheon – Networking Roundtables Hosted by Industry Leaders**

Practitioners and solution providers host a menu of luncheon discussions on pertinent industry issues. Dine and dish with industry experts. The list of discussion topics will be available on-site.

Hosted by:

**1:30pm Session-to-Session Travel Time****1:35pm CONCURRENT COLLABORATION ZONES – The Strategic Boardroom and ThinkTanks**

ThinkTank sessions employ interactive team exercises in a “roll up your sleeves” learning environment.

The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.

Choose one of the following zones:

**Zone 1. Strategic Boardroom: If I Only Knew Then What I Know Now****FACILITATOR:**

**Jerry Leisure**

Chief Executive Officer

Officium Labs

**SESSION ABSTRACT:** Looking back through the prism of time, I am reminded of the “What If” scenario that enters our mind, when we reflect on the past. More to the point, “If I Only Knew then What I Know Now” and what would I do differently. As humans we are an anxious and ever learning species. We don’t accept the status quo. We must push ourselves, we must learn, we must be better, and that means we drive ourselves to be our best self.

**KEY TAKE-AWAYS:**

- Peer collaborated answers and strategies on What they Know now
- Framework for ideation and feedback inside your organization
- Best practices on how to implement changes inside a large organization

**Zone 2. ThinkTank: Data Driven Customer Experience****FACILITATOR:**

**Parikshit (PK) Kalra**

Senior Vice President, Solutions & Capabilities

HGS

**SESSION ABSTRACT:** Are you listening to the voice of your customer (VoC) and connecting that to the right metrics and processes to achieve your business objectives? In this interactive session, we will discuss moving from reactive data and tactical operations management to proactive data and strategic management by using analytics as a tool to facilitate VoC decision making. Each participant will unpack opportunities to evaluate their business insights framework and assess where their organization currently resides within each stage of proactive data management.

**KEY TAKE-AWAYS:**

- Benchmark your approach to determine if you are pro active or reactive in use of business insights
- Apply best practices to measure the right metrics
- Identify opportunities to create action from your insights



## AGENDA

**Zone 3. ThinkTank: RPA – Efficiency in Operations and Customer Experience****FACILITATOR:****Deb Schweizer***Senior Vice President, Global Business Solutions  
Teleperformance*

**SESSION ABSTRACT:** Are BOTs taking over the world? Will RPA and NLP replace all human interactions? In the age of the connected customer, it's more important than ever for companies to figure out the best mix of human and digital support for their customer interactions. This session will explore practical ways to incorporate these newer paradigms to improve the agent experience, the customer experience, and optimize business processes to bring about digital transformation – and will bring to life methods to adapt and adopt these technologies today and create a roadmap for the future.

**KEY TAKE-AWAYS:**

- Practical applications of RPA in the contact center
- Insight on the equation between efficiency and experience
- Guide to where RPA works and where it does not
- Best practices for implementing an RPA/BOT solution

**Zone 4. ThinkTank: Equipping Your Agents to Deliver Proactive, End-to-End Service****FACILITATOR:****Andrew Papparides***Head of Support Strategy  
ServiceNow*

**SESSION ABSTRACT:** Customers expect a quick response to their issues. They want you to diagnose and recognize the problem and then provide relief as fast as possible. But you shouldn't stop there. After you've received their acceptance of the proposed resolution, fully removing the defect prevents other customers from experiencing the same issue. The 5 R's above – response, recognition, relief, resolution, and removal – are simple to list. Yet in a complex environment, such as when agents must work with other departments, completing all five steps rapidly and consistently is challenging without automation. This interactive session will explore a team support philosophy for the 5 R's and discuss how a blueprint for high-performance customer support could apply to your organization.

**KEY TAKE-AWAYS:**

- Best practices for resolving complex issues end-to-end
- Critical elements enabling problems to be fixed before customers know they have them
- Proven ways to instantly take care of common customer requests

**Zone 5. ThinkTank: Strategic Mapping of an Integrated Self-Serve Journey****FACILITATOR:****Lisa Michaud***Senior Product Manager  
Interactions*

**SESSION ABSTRACT:** Today's customer care market is ever-changing and enterprises are facing increasing customer demands. While it can be overwhelming to manage these expectations coupled with a growing list of customer care channels, the best place to start is by strategically outlining your customer experience journey. One of the most critical aspects to consider is how to incorporate self-service. Join this interactive session on the mapping of your self-serve experience.

**KEY TAKE-AWAYS:**

- Insight on the rapid progression of customer care and what that means for businesses
- Best practices for mapping out and integrating a self-service strategy into your overall CX initiatives
- An understanding of the impact that customer engagement has on overall business strategy and success

# AGENDA

**3:05pm Briefing Sessions, Networking, Refreshment and Exhibition Break**

**Featured Demonstration**

Hosted by:



interactions

**3:50pm CONCURRENT COLLABORATION ZONES – BEST PRACTICES**

Best Practice sessions examine a real world use case, dissect the best practices employed, and explore how to apply them to your own initiative and company.

The Strategic Boardroom engages participants in high level debate and discussion around preparing for C-Suite conversations on customer experience and customer care issues facing the organization. Please note: The Strategic Boardroom is reserved for senior level, seasoned executives and seating is limited to encourage maximum participant interaction.

Choose one of the following zones:

**Zone 1. Transitioning from Bot to Live Chat**

**CO-FACILITATORS:**

**Lisa Diehl**

Consumer Advocacy, Global Retail Division,  
North America Consumer  
Blue Diamond

**Neal Topf**

President  
Callzilla

**SESSION ABSTRACT:** It's not as complicated as you think. Automation and Live Agents can and should co-exist and be utilized in customer-facing strategies. This interactive session will examine experience, best practices, mistakes made, and recommendations in building a successful ecosystem that satisfies customers and provides optimal experiences based on interactions with Chat Bot and Live Agent.

**KEY TAKE-AWAYS:**

- Case Study format on commentary and data-points on technology vendor-selections
- Before and after comparison of Chat Bot and Live Chat implementations
- Top 5 recommendations for implementing successful Chat Bot Live Chat programs
- Top 3 Mistakes (pitfalls) to avoid

**Zone 2. Best Practice: Capture, Analyze, Optimize: Your Employee Analytics Journey from the Call Center Floor to the Boardroom**

**FACILITATOR:**

**Brent Stevenson**

Senior Vice President, Sales & Marketing  
24-7 Intouch

**SESSION ABSTRACT:** Leveraging data insights is essential in making strategic business decisions beyond the contact center. We capture and analyze data to obtain a deeper understanding of employee engagement, but how are you connecting these data dots to effectively communicate your strategy to your C-Suite to improve your return on each interaction? Join this interactive session to learn new approaches to creating and obtaining buy-in from leadership on a data-centric strategy to drive change throughout your entire organization.

**KEY TAKE-AWAYS:**

- Blueprint for leaders on leveraging your employee data metrics from the contact center to the boardroom
- Best practices for correlating employee interactions in training to your metrics and drive it forward
- Guide to increasing your ROI through real-time QA monitoring

# AGENDA

## Zone 3. Best Practice: How AI is Helping to Create Empowered and Efficient Support Teams

**FACILITATOR:**

**Chris Savio**

Senior Product Marketing Manager  
Bold360 by LogMeIn

**SESSION ABSTRACT:** When it comes to support, AI is positioned by many as the death knell for customer service jobs. However, for many organizations this isn't only inaccurate, the truth is quite the opposite. AI is actually enabling customer service agents to be even better at their jobs. In this interactive session, you'll learn how turning AI from customer-facing to support team-facing can help organizations be more efficient and deliver differentiated customer experiences.

**KEY TAKE-AWAYS:**

- Insight on why consistent access to information can drive consistent customer experiences
- Best practices for using AI to deliver actionable insights on support team knowledge gaps
- Guide to driving greater agent satisfaction and employee empowerment with AI
- Real world examples of how brands are using AI to drive greater team productivity and better business outcomes

## Zone 4. Best Practice: Six Sigma: Process Improvement in the Contact Center

**CO-FACILITATORS:**

**Dominique Jaritz**  
Chief Executive Officer  
ThinkOwl Japan

**Nina Brown**  
Vice President, Client Solutions  
Datamark

**SESSION ABSTRACT:** We are all faced with numerous issues in the day-to-day challenges of our contact centers. The Six Sigma DMAIC process we will explore offers a methodical approach for being able to define the true issue clearly, analyze comprehensively in order to select an appropriate improvement solution, and control the implementation in order to ensure that you gain the expected benefits.

**KEY TAKE-AWAYS:**

- Insights on when you know there is a problem, how do you understand what the problem really is
- Guide to picking the right tool(s) to solve the problem
- Best practices for ensuring that the selected solution is actually improving things

4:50pm **Session-to-Session Travel Time**

# AGENDA

**4:55pm SUCCESS STORY – Join us for a Burst of Insight on:**

★ **Hiring for Staying Power and Brand Fit**

**Regan Heckethorn**

*Vice President, Operations*

*Allegiant Air*

**SESSION ABSTRACT:** Contact Center employees directly reflect your business and are instrumental in the success of your brand. Are you having challenges with finding the best talent? Do you feel like your employees don't reflect your companies service values? This session will unpack how Allegiant launched a focused customer experience culture by reinventing the recruiting and selection process - in the process transitioning from a typical "fill a seat" task to an aspirational, "fill the future" mindset.

★ **Continuous Improvement of the Customer Experience**

**Kal Kuchimanchi**

*Director, Global Planning & Programs*

*Uber*

**SESSION ABSTRACT:** Continuous improvement is a great idea! However, creating a sustained program for continuous improvement in an organization is quite difficult. After several not-so-successful attempts, Uber created a new, game-changing model for continuous improvement. This session will closely inspect what made this new model successful and while illustrating best practices that can be ported to any organization.

**KEY TAKE-AWAYS:**

- Insight on why identifying passion, desire, drives and "heart" in the first interaction has proven successful for both the employee and the company
- Blueprint for successfully letting the trainers train skill for success
- Best practices for engaging leadership in the hiring process and incorporating behavioral, conversational and personality trait recognition techniques

**KEY TAKE-AWAYS:**

- Best practices for creating a culture of continuous improvement – inspiring and empowering everyone in the organization to contribute to it
- Guide to measuring benefits of improvements – advice on how it should reflect in your KPIs
- Common pitfalls and pragmatic ways to avoid them

**5:30pm General Session Concludes**

**6:00pm**

## 15th Anniversary Customer Contact Wild West Olympics & Cookout

Gear up for a night of Olympic games with Western flair. Dinner will be served throughout the night and our top teams will be draped in Gold, Silver & Bronze, YEEHAW! Saddle up and show us your wild west side!





# AGENDA

**Wednesday, October 30, 2019 | GENERAL SESSION, EXHIBITION, AND SITE TOUR**

**7:15am Beach Yoga**

Calling all yogis! Get energized while building strength and flexibility with us. This upbeat, creative yoga practice, will link breath and movement to keep you present and centered. We'll utilize Sun Salutations, strength building and connected movements to help you face the day with a courageous spirit.

**8:30am Continental Breakfast and Exhibition**

**Featured Demonstration**

Hosted by:



**9:10am KICKOFF AND HEADLINER – Embracing the Workforce of the Future**

**9:55am EXECUTIVE INSIGHT – Mapping Root Cause for Proactive Solutions**

**Aisha Ponds**

Director, Stakeholder Escalations  
BlueCross BlueShield of North Carolina

**SESSION ABSTRACT:** The handling of customer complaints and concerns is a challenge shared by all contact centers. But just resolving a specific issue should not be a one and done approach. Learn BlueCross BlueShield of North Carolina's process to identify root causes and how they use that analysis to develop strategies to prevent or minimize future occurrences.

**10:25am Networking, Refreshment, and Exhibition Break**

**Featured Demonstration**

Hosted by:



**10:55am SUCCESS STORY – Customer Experience Measurement**

**Katrina Schiedemeyer**

Senior Engineer of Global Procurement & Supply Chain  
Oshkosh Corporation

**SESSION ABSTRACT:** Metrics are a top priority for many Customer Experience initiatives. However, there are hundreds of different metrics which makes it difficult to select one without it feeling like a 'new flavor of the month'.



**KEY TAKE-AWAYS:**

- Best practices to establishing escalation processes with your business partners
- Fresh perspectives on how to use learnings from escalations to better train/coach your frontline staff
- Techniques on how to creatively educate the organization (across silos) on lessons learned to make process improvements outside of your business area

**KEY TAKE-AWAYS:**

- Proven ways on how to select a metric that is relevant to your organization
- Alternative metrics if the traditional NPS (Net Promoter Score) is not working for you
- Strategies to communicate the benefit of your metric to leadership

Wednesday, October 30, 2019

# AGENDA

**11:25am**     **INSIGHTS AND IDEAS ROUNDUP – The Great Take-Away: Implementing the Best, Brightest and Boldest Ideas from the Program**

Participants at each Customer Contact Executive MindXchange come away with a wealth of key learnings and it can be a challenge to take it all in. During this interactive session, members of the Customer Contact community will highlight the most important themes, key take-aways and lessons learned they can be readily operationalized once you are back in the office.

**MODERATOR:**

**Alpa Shah**

*Vice President, Digital Transformation  
Frost & Sullivan*

**PANELISTS INCLUDE:**

**Raquel Macarthy**

*Head of Customer Experience  
Replacements  
Customer Engagement Leadership  
Council Member*

**Derek Carder**

*Vice President, Customer Experience  
& Technical Operations  
Geotab  
Customer Engagement Leadership  
Council Member*

**Joel Kell**

*Director, Service Operations  
Elevate  
Customer Engagement Leadership  
Council Member*

**12:00pm**     **Content For The 15th Anniversary Customer Contact West Concludes**

**BANK OF AMERICA CONTACT CENTER TOUR AND EXECUTIVE ROUNDTABLE**

**1:00pm**     **Contact Center Site Tour – Bank of America**

**3:30pm**     **CUSTOMER ENGAGEMENT LEADERSHIP COUNCIL EXECUTIVE ROUNDTABLE**

**4:30pm**     **SITE TOUR AND EXECUTIVE ROUNDTABLE CONCLUDE – Shuttle Transportation to Huntington Beach Resort & Spa Provided.**



“You are the average of the five people with whom you spend the most time.”

—Jim Rohn, *Entrepreneur*

**THE PREMIER  
COMMUNITY FOR  
EXECUTIVES IN  
CUSTOMER EXPERIENCE,  
MARKETING AND  
CUSTOMER CARE**

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To stay competitive in your world of customer engagement, spend time with others who have charted the course.

The Customer Engagement Leadership Council by Frost & Sullivan offers a unique opportunity to connect year-round with action takers and forward thinkers from across industries.

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— **Robert T. Gofourth**

*Vice President, Operational Strategy and Performance*  
BlueCross BlueShield of North Carolina



**Customer Engagement  
Leadership Council**  
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Aceyus, the expert in Contact Center technology, unifies multi-platform/omni-channel data through highly customizable dashboards and optimized reporting. As companies embrace new digital channels Aceyus is at the center, keeping the focus on Customer Experience with a goal of increasing satisfaction, employee engagement and bottom line profitability.

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Acquire BPO is a global outsourcer located in the US, Australia, Philippines and Dominican Republic. With 7,000+ staff and 12-years' experience, we deliver automated, intelligent contact center and back-office functions for global businesses. We're on IA-OP's® best outsourcing providers' list and Stevie's Most Innovative Company of the Year.

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Aspect is on a mission to simplify and improve customer engagement. Our best-of-breed contact center and workforce optimization applications help companies keep agents engaged while providing exceptional customer experiences. Our flexible, scalable solutions for self-service, interaction management and workforce optimization are available as on-premises, hosted, private or public cloud deployments

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By leveraging the power of A.I., Bold360 helps personalize and enhance every customer engagement – no matter where it takes place – allowing companies to deliver better and more consistent customer experiences seamlessly across both A.I. and agent-based interactions. Bold360 delivers groundbreaking intelligence with out-of-the-box simplicity and helps agents do what they do best – be human.

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Cicero provides desktop process automation and analytics software that help organizations isolate issues and automate employee tasks in the contact center and back office. By realizing and removing the barriers to productivity, customers such as Nationwide and UBS use Cicero software to build enterprise value by improving performance, reducing cost, and transforming the employee and customer experience.

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D2L is a learning platform for organizations who value learner success as a driver of business success. Brightspace, our platform, helps prepare and engage your workforce with a personalized learning experience, peer-to-peer knowledge sharing, Social Assessment™ and more. With a fully open API, Brightspace can easily integrate within your existing technology ecosystem.

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We serve as an extension to your brand. As a leading business process outsourcing (BPO) company, DATAMARK empowers Fortune 500 companies and large enterprises with the strategies, solutions, and workforce to streamline workflows, control risks and reduce costs.

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Eventus delivers Managed Solutions, Strategy and Consulting, and Experience Innovations with engagement models that Amplify CX Outcomes. Eventus has influenced over 1 billion customer interactions, reduced over \$100mm in Client costs, all while improving customer loyalty. Eventus provides industry expertise, a partner ecosystem, and proven methodologies that enable their Clients to exceed goals, minimize risk, and drive CX success.

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Five9 is a leading provider of cloud contact center software, bringing the power of the cloud to thousands of customers and facilitating more than three billion customer interactions annually. Since 2001, Five9 has led the cloud revolution in contact centers, helping organizations of every size transition from premise-based solutions to the cloud.

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Helpshift's next-generation digital customer service platform enables B2C brands to scale their support while offering differentiated experiences through web, in-app, email and messenger app channels. Serving over 450 businesses worldwide, including Xfinity Home, Microsoft, Tencent and Supercell, Helpshift is headquartered in San Francisco, with offices around the globe.

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HGS provides business process management (BPM) services from contact centers to HRO, back-office, and marketing solutions. Taking a true "globally local" approach with over 44,200 employees in 75 worldwide locations, HGS combines technology-powered services in automation, analytics, and digital to deliver transformational impact to some of the world's leading brands across nine key verticals.

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Interactions provides Intelligent Virtual Assistants that seamlessly combine AI & human understanding to enable businesses & consumers to engage in productive conversations. With flexible solutions designed to meet the growing demand for unified, multichannel customer care, Interactions is delivering significant cost savings & unprecedented customer experience for some of the largest brands in the world.

[www.interactions.com](http://www.interactions.com)







Jacada's automation expertise and IP within customer operations continues to deliver end-to-end customer service automation solutions to global enterprises. Our 27 years of experience in automating customer service processes for global enterprises, together with proven outcome-focused integration capabilities, enable worry-free deployments with lower Total Cost of Ownership.

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PTP collaborates with leading businesses to develop results-driven technology solutions that transform customer experience. PTP stays connected to your business drivers while enabling a 360° view of the customer to increase engagement enterprise wide by optimizing technology and business processes to breakdown silos and enhance customer connections through seamless omni-channel communication.

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ServiceNow makes work better across the enterprise. Getting simple stuff completed at work can be easy, and getting complex multi-step tasks accomplished can be painless. Our applications automate, predict, digitize and optimize business processes and tasks, across IT, customer service, security operations, human resources and more, creating a better experience for your employees and customers.

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Talkdesk Enterprise Contact Center Platform empowers companies to make customer experience a competitive advantage. With enterprise class performance and consumer-like ease of use, over 1,400 innovative companies rely on Talkdesk to power their customer interactions.

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TTEC (previously known as TeleTech) is a global customer experience company that designs, builds and operates captivating omnichannel customer experiences. With more than 49,000 employees and 85 customer engagement centers around the world, we offer customer care and tech support, customer acquisition and retention, CX consulting and omnichannel technology.

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15TH ANNIVERSARY

## CUSTOMER CONTACT WEST:

A FROST & SULLIVAN EXECUTIVE MINDXCHANGE

October 27 - 30, 2019 | Hyatt Regency Huntington Beach Resort and Spa | Huntington Beach, California

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- Event Registration \$2,795.00  
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#### A-LA-CARTE OPTIONS:

- Wine Tour & Tasting \$ 50
- Site Tour \$100
- Customer Contact 2019 West Executive MindXchange Chronicles
  - Pre-Event | On-Site \$ 395
  - Post-Event \$ 495
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### CUSTOMER CONTACT 2019 WEST EXECUTIVE MINDXCHANGE CHRONICLES

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10/10/19