



Customer Engagement
Leadership Council
FROST & SULLIVAN

CUSTOMER ENGAGEMENT LEADERSHIP COUNCIL

NAVIGATE THE FUTURE OF CUSTOMER ENGAGEMENT WITH CONFIDENCE



Today's Agenda

Introductions

History – Then & Now

The Purpose & Value

What We Do – Member Voted Critical Issues

Community & Network

How We Do It – Deliverables & Collaboration

Overview of the Council Program

Q&A, Next Steps

Then & Now:

The Beginnings of The Customer Engagement Leadership Council

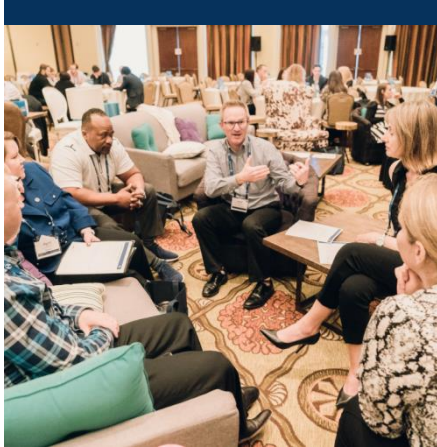
Frost & Sullivan launched an Executive Events division to provide senior-level management execs with insights into market opportunities, competitive threats, technical trends, emerging markets and competitive strategies.

Two Customer Contact Executive MindXchange Events launched in the US; One launched in Europe.

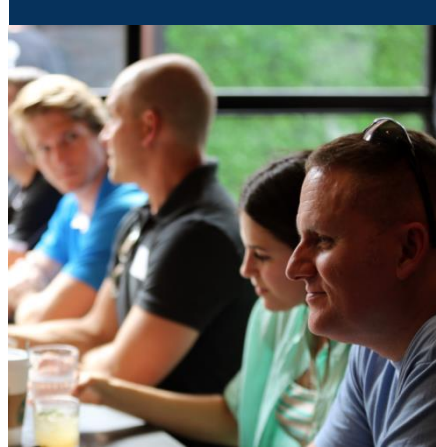
The Customer Engagement Leadership Council was founded as a member-driven organization. The Council serves as an enabler for business leaders to deepen customer engagement by focusing on the intersection of critical business and technology issues that will drive growth for themselves and their organizations.



Purpose: Serving the Needs of the Community



Executives want an opportunity to **engage with a cross-industry network of peers** on a continual basis to explore critical issues.



Executives want a forum where content is **member-driven**, aligned with critical issues, and constantly evolving.

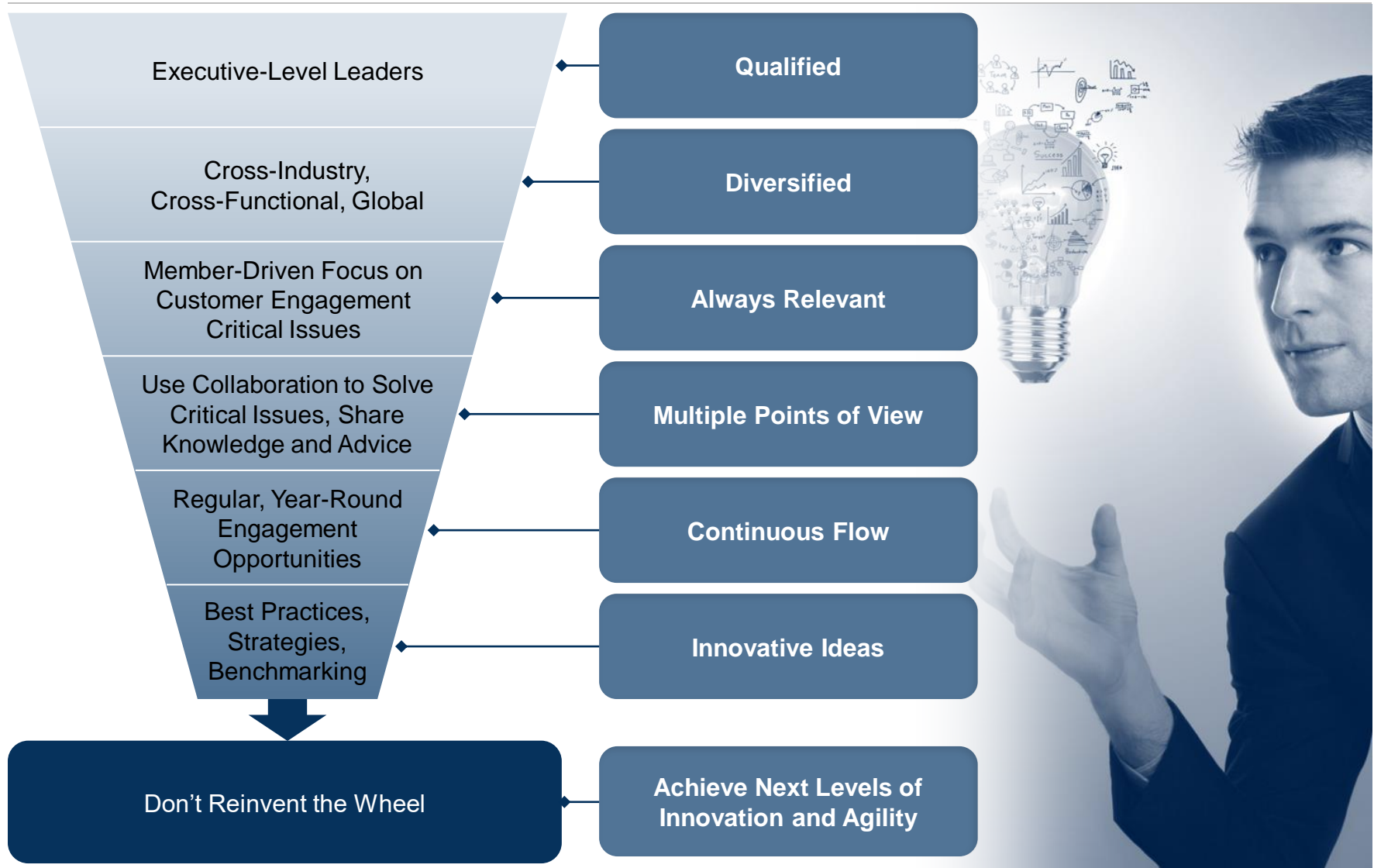


Executives want a platform with impactful insights from peers to **develop the next generation of leaders** from within their own teams.

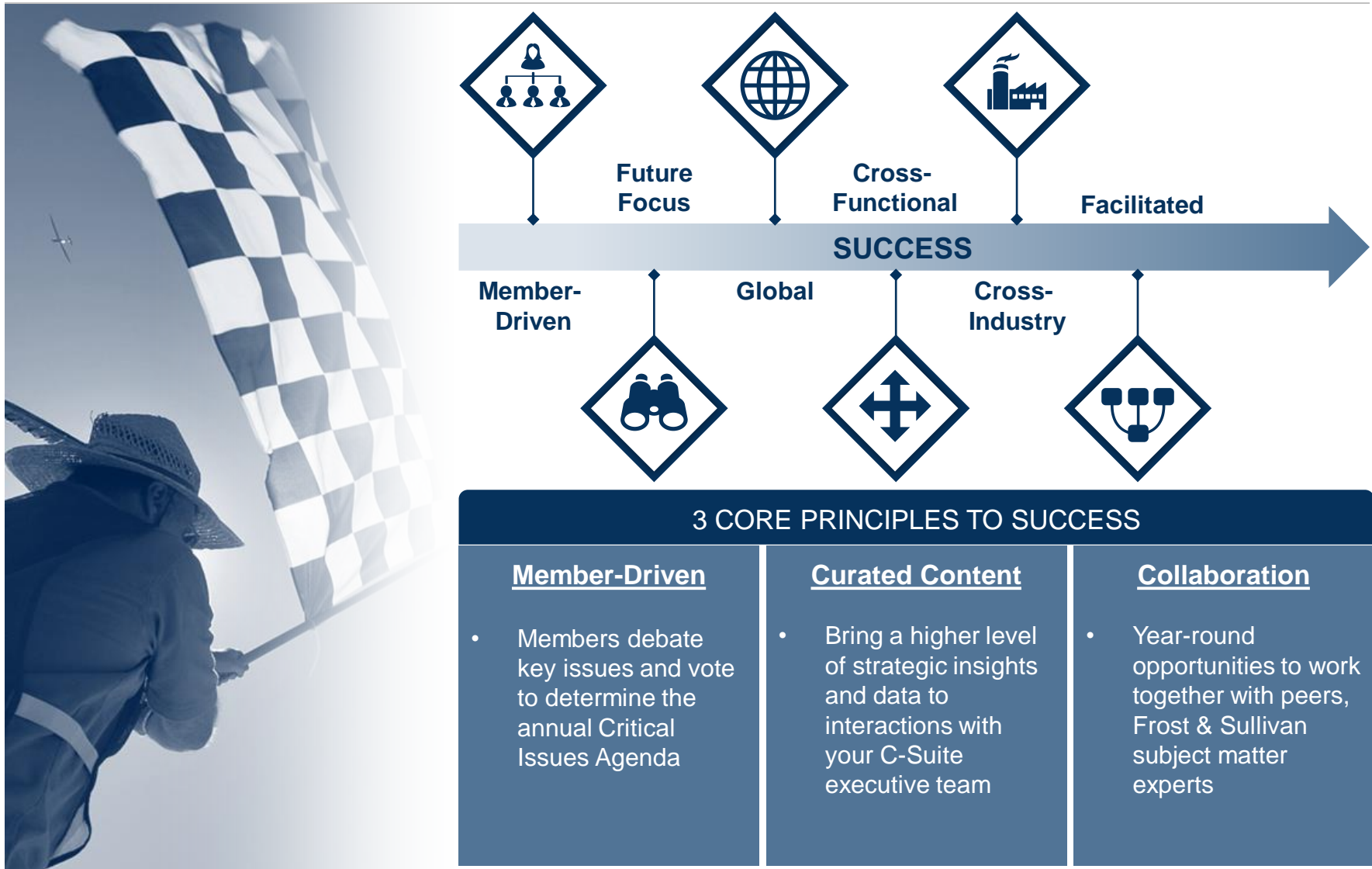


Executives are searching for **current thought leadership** – relevant content curated easily accessible for them.

Value: Customer Engagement Leadership Council



A Unique Value Proposition





1

MEMBER VOTED CRITICAL ISSUES AGENDA



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Annual Council Meeting*

**Part of a Customer Contact West: A Frost & Sullivan Executive MindXchange event.*

October 2020 – Tucson, Arizona



Each year, Council members come together to meet one another and collaborate to set the Critical Issues Agenda for the year ahead. These issues then guide the development of our live events, virtual events, and curated content on the portal. Setting the Critical Issues Agenda is a key role in ensuring the content for the Council is driven by its members.

What We Do - Critical Issues Agenda: 2020

PREDICTIVE, PROACTIVE, AND PERSONAL CARE

Driving an effortless experience by meeting the unexpressed needs of your customer, and allocating resources for greater impact.

SELF-SERVE

Aligning your brand strategy (high touch, low touch) with self-serve strategy is critical to the successful automation of your customer interactions. Mapping the self-serve customer journey experience is a success factor for understanding and enhancing those interactions, and delivering ROI.

AUTOMATION

Practical application of automation: what you can do today to move the needle.

What We Do - Critical Issues Agenda: 2020

OPERATIONAL EFFICIENCY AND EFFECTIVENESS

The C-Suite demand for operational efficiency and effectiveness remains unabated. Finding ways to continuously improve processes and keep your CFO happy is critical to long term success in any contact center. Plan for the “must have” people, process, and technology needed to meet the expectations placed on you by senior management.

EFFORTLESS AGENT EXPERIENCE

Getting the agent experience right is your first step in delivering a true effortless experience for your customers.

TRANSFORMATION- AL TALENT

Navigating the changing dynamics of the contact center workforce, paired with technological advances, is key to the future.



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CUSTOMER ENGAGEMENT LEADERSHIP COUNCIL PROGRAM BENEFITS



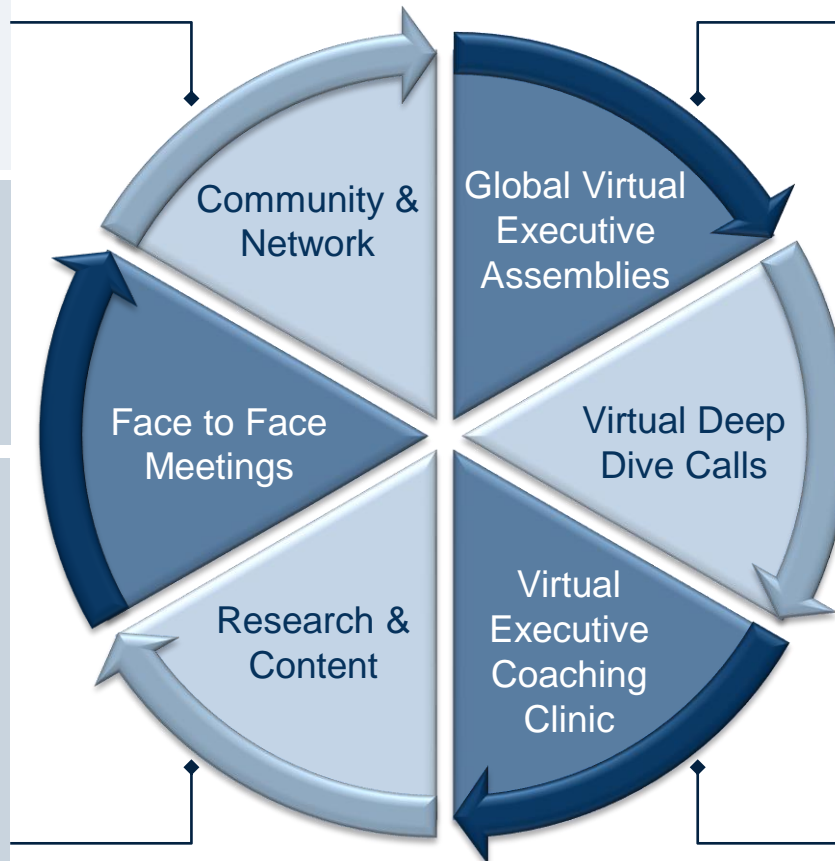
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How We Do It - Program Benefits

1. Cross-functional, cross industry network of peers
2. Opportunity to connect 1x1

1. Annual Council Meeting
2. Five Executive MindXchange events
3. Contact center site tours and executive roundtables

1. End User Priorities for Customer Engagement, Global Study
2. Customer Contact Benchmarking Survey
3. Keynote & All-Star presentation videos
4. Event presentation slides
5. Meeting notes and summaries
6. Executive MindXchange Chronicles
7. Exclusive access to member portal website



Hosted by expert peers, members engage in an interactive discussion on member-driven topics aligned with critical issues

Hosted by a Frost & Sullivan analyst/subject matter expert, members have the opportunity to unpack the data insights of Frost & Sullivan's End User Priorities for Customer Engagement, Global Study

Michael O. "Coop" Cooper, Founder of Innovators + Influencers, hosts a live coaching call and opportunity for members to get coaching and/or learn from peers' examples.

ASSOCIATE MEMBERSHIP

Designate up to 5 leadership positions and/or business line owners (executives), within your organization, to join you in Council, as an associate member.



Benefits	
Access to the Community: Members-Only Council Portal Credentials and Networking	✓
\$1,000 savings* on Select Executive MindXchange Events	✓
Subscription to Bi-Weekly Council Communications	✓
Access to Virtual Events	✓
1 Group Call per Month with a Personal Concierge	✓

*May not be combined with other offers.



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CUSTOMER ENGAGEMENT LEADERSHIP COUNCIL MEMBERS

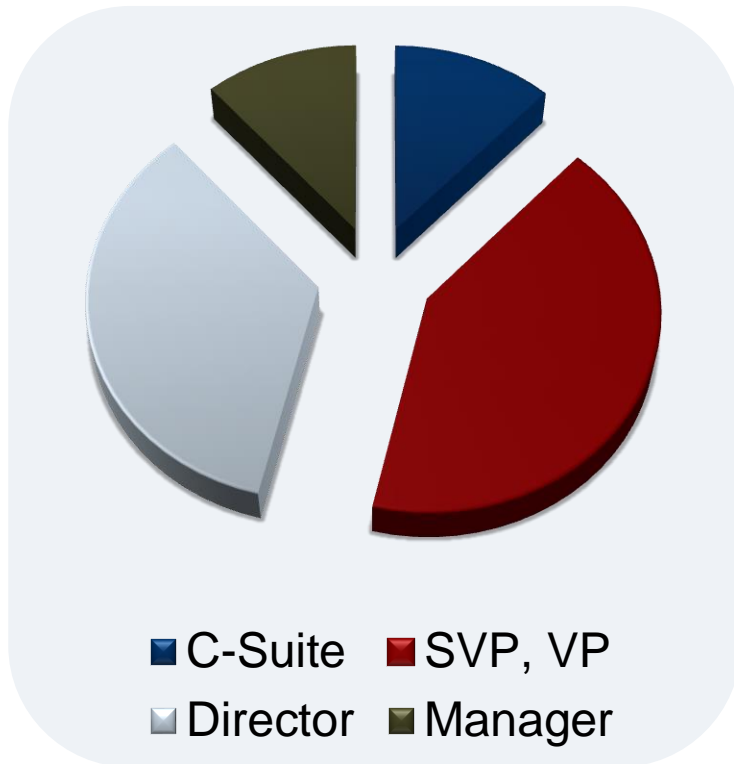


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Community & Network: Extensive Global and Cross-Industry Membership

				
				
				
				
				 Customer Engagement Leadership Council FROST & SULLIVAN

Community & Network - Demographics



INDUSTRIES REPRESENTED

- Consumer Goods, Services, and Retail
- Financial Services, Banking, and Insurance
- Healthcare, Pharmaceuticals, Biotech
- Industrial, Energy, and Manufacturing
- Information & Communication Technologies
- Travel & Hospitality

FUNCTIONAL ROLES REPRESENTED

- Customer Care
- Customer Channels
- Customer Experience
- Customer Contact Center
- Customer Service
- Marketing
- Operations

Community & Network - Member Snapshot



ELLIE BROUGHTON

Assistant Director, Customer Experience
A2Dominion Group



ROB GOFOURTH

Vice President,
Operational Strategy & Performance
BlueCross BlueShield of North Carolina



MATT HAYES

Principal Program Manager
Microsoft



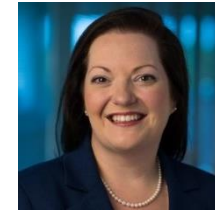
JAMIE LANCASTER

Vice President, Contact Center
Kroger



CATHY MARINO

Senior Director, Customer Care
Bristol-Myers Squibb



ERIN McMILLAN

Assistant Vice President,
Customer Operations
AutoTrader

Community & Network: **Kind Words from Members**

“The Leadership Council is an incredible network of executives that tackle the current challenges of the industry as well as work on developing thought leadership around tomorrow’s challenges. The level of engagement, problem solving and forward thinking has driven me to continue being a member of this community. Whenever I have a challenge or problem, I can count on one of my colleagues in the Council to have a thought provoking idea or solution around the topic. It is truly one of the most valuable organizations I belong to.”

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

“This is my second year as a Council Member and I enjoy networking with other council members and Frosties along with access to all of the Curated Content materials, the opportunity to attend all Frost & Sullivan events, and the opportunity to provide input on future meetings. The Frost & Sullivan team is amazing to work with and they always go above and beyond to ensure that you have what you need to be successful.”

- *Manager, Operations, **Mayo Clinic Ventures***



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VIRTUAL MEETINGS



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Webinar Week Series: Customer Contact

May 18 – May 22, 2020 | 11:00 AM EDT/15:00 GMT

A week's worth of virtual content presented live by the speakers you were scheduled to see/hear onsite.

- Daily 30-minute virtual presentations from these experts in the field of customer contact followed by a 30-minute roundtable discussion exclusive to Council members and their associate members.



Monday, May 18th

Why Shoot from the Hip? Use Data to Restart and Reimagine Your Business Instead

Neil Crane, Vice President of Product and Technology, Cicero Inc.
& Don Peppers, Founder, Peppers & Rogers Group, Author, *The One to One Future*



Tuesday, May 19th

Customer Service Hero Stories From the Front Lines

Scott Merritt, Vice President, Global Head of Automation, Jacada



Wednesday, May 20th

Optimizing Authentication for COVID-19 in the Contact Center

Craig Pentz, Vice President of Sales, Neustar



Thursday, May 21st

Self-Service Strategy: Before, During and After a Crisis

Brent Sparks, Senior Director, Self Service Platforms, Customer Success Products, PayPal & Crystal Collier, Executive Consultant, PTP



Friday, May 22nd

Ensuring Employee Performance and Engagement in Times of Change

Richard Correia, Director of Product Marketing, NICE

Global Virtual Executive Assemblies



Facilitated and moderated interactive discussions led by peer expert(s)

Engage in an easily accessible & collegial environment from anywhere in the world

Harness collective knowledge from Council members on member-driven topics aligned with critical issues

Virtual Executive Assembly

We've Discussed



Elevate

Agent Culture & Engagement

April Sealy, Vice President, Operations



Altisource

Artificial Intelligence

Kandy White, Senior Vice President, Global Operations



FORTE

Gig Economy and the Workforce of the Future

Jerry Leisure, Vice President of Customer Success



TechStyle
Fashion
Group

Self Serve

Aarde Cosseboom, Senior Director of GMS Technology, Analytics, and Product



UL EHS SUSTAINABILITY

VOC Analytics (EU)

Nate Brown, Director of Customer Experience



AIB

Effortless Customer Experience (EU)

Kathy O'Mahony, Personal Market Manager, Direct Banking



BT

Effortless Customer Engagement Strategy (EU)

Dr. Nicola Millard, Principal Innovation Partner



PROGRESSIVE

Disaster Recovery

J.C. Jones, Business Leader, Customer Relationship Management, Progressive Insurance
Michael Durbin, Director, Capacity and Operations, Progressive Insurance



BlueCross BlueShield
of North Carolina

Mapping Root Cause for Proactive Solutions

Aisha Ponds, Director, Stakeholder Escalations

Virtual Deep Dive Calls



Take a
Deep Dive

Hosted by a Frost & Sullivan
Analyst/Subject Matter Expert

Analyze Critical Data Insights and
Information for Benchmarking

Gain Understanding of Cross-Industry,
Global Best Practices

PREVIOUS DEEP DIVE TOPICS

- **End User Priorities for Customer Engagement, Global**
Alpa Shah, Vice President of Research, Frost & Sullivan
- **Omni Channel Customer**
Nancy Jamison, Principal Analyst, ICT, Frost & Sullivan
- **Robotic Process Automation**
Nancy Jamison, Principal Analyst, ICT Frost & Sullivan

Virtual Executive Coaching Clinic

Executive Coaching with
the Founder of



Michael O. “Coop” Cooper

**A Live Coaching Call and Opportunity
to Get Coaching or Learn From Peers’
Examples**

**Gain Clarity, Create Change, and Make
Progress on Your Goals, Outcomes or
Strategies**

**Bring a Current Problem that You Want
to Change, or Just Listen In and Learn
Vicariously**

Michael O. “Coop” Cooper, Founder of Innovators + Influencers, will be your Virtual Executive Coach. Coop is an internationally recognized executive coach, advisor, facilitator, and trainer who specializes in working with executive teams to develop the leadership skills, alignment, and strategies to grow and thrive in a constantly changing environment.

Coop has 23 years of experience as a coach, management consultant, strategist, and project leader with Fortune 1000 companies and small businesses in over 20 countries. He has worked with leaders at Accuray, eBay, Genentech, Google, Novell, Sony Computer Entertainment America, Southwest Airlines, TeleNav, Wells Fargo, Yahoo, Yammer, and hundreds of other organizations large and small. He has also been selected to coach the prestigious TED Fellows.

Upcoming Global Virtual Meetings



Webinar Week Series: Customer Contact - Pivot with Agility
May 18 – May 22, 2020 | 11:00 AM EDT/15:00 GMT

- **Monday, May 18th** - Why Shoot from the Hip? Use Data to Restart and Reimagine Your Business Instead
- **Tuesday, May 19th** - Customer Service Hero Stories From the Front Lines
- **Wednesday, May 20th** - Optimizing Authentication for COVID-19 in the Contact Center
- **Thursday, May 21st** - Self-Service Strategy: Before, During and After a Crisis
- **Friday, May 22nd** - Ensuring Employee Performance and Engagement in Times of Change



Virtual Executive Assembly on Hiring for Brand Fit
June 11, 2020 | 11:00 AM EDT/15:00 GMT



Webinar Week Series: Customer Contact
June 15 - 19, 2020 | 11:00 AM EDT/15:00 GMT
Content Being Confirmed



Webinar Week Series: Sales Teams Adapt & Reinvent
June 22 - 25, 2020 | 11:00 AM EDT/15:00 GMT
Content Being Confirmed



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RESEARCH & MEMBER PORTAL CONTENT



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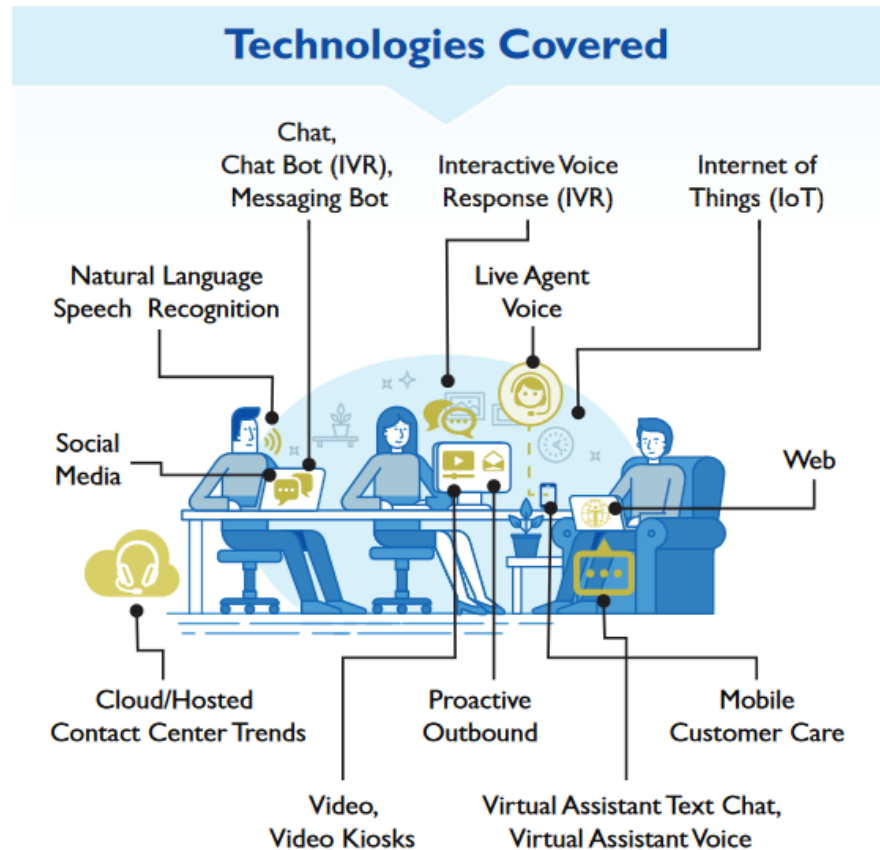
Research – Frost & Sullivan’s End User Priorities for Customer Engagement, Global Study 2019

WANT MORE DATA ON CUSTOMER EXPERIENCE TRENDS AND CONTACT CENTER METRICS?

Valuable resource for navigating digital transformation in the contact center

Delivers critical information for benchmarking and identifies cross-industry global best practices

Available to you via a PDF, downloadable and shareable



Research – Customer Engagement Leadership Council Benchmark Survey



For WHO

Customer
Engagement
Leadership
Council Members



WHAT Is It

a survey to help
you assess
customer
satisfaction and
performance



The WHY

the goal of the
survey is to
provide metrics to
spark change
within your contact
center and help
drive your
customer
experience strategy
decisions

- ✓ Insight on how your contact center metrics compares to others, both within your industry and across industries and geographies
- ✓ Assessment of the range of valuable metrics the industry is leveraging, and how to determine which ones are right for your business and organization
- ✓ The metrics central in identifying, balancing, and improving both CX and EX

BONUS: As a Council member, you will also have an opportunity to meet with a Frost & Sullivan analyst to examine the results of the survey and hear their recommendations.

Member Connections

<http://www.customerleadershipcouncil.com/member.php>

- Year-round access to fellow Council members
- Profiles include professional summary, areas of expertise, and contact information
- Helpful filters to search member profiles by region and by their area of expertise

MEMBER CONNECTION

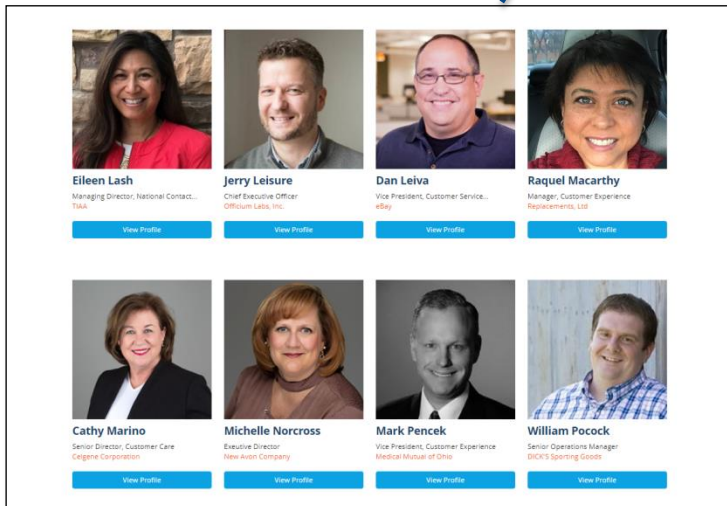
Meet Your Fellow Members









Filter By Region

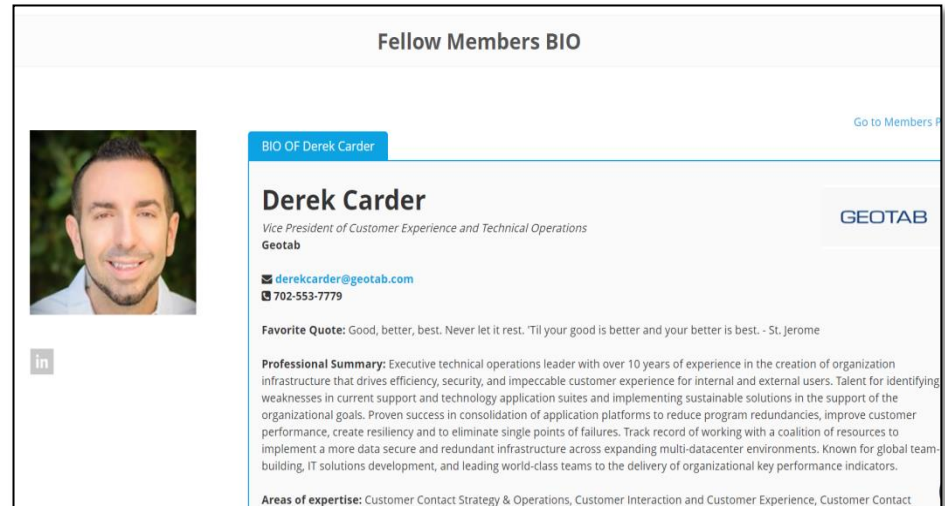
American European

Filter By Expertise

Interaction and Customer Experience Customer Contact Tech




 Eileen Lash Managing Director, National Contact... View Profile	 Jerry Leisure Chief Executive Officer Offitium Labs, Inc. View Profile	 Dan Leiva Vice President, Customer Service... eBay View Profile	 Raquel Macarthy Manager, Customer Experience Homebrewery, Ltd. View Profile
 Cathy Marino Senior Director, Customer Care Caltene Corporation View Profile	 Michelle Norcross Executive Director New Avon Company View Profile	 Mark Pencek Vice President, Customer Experience Medical Mutual of Ohio View Profile	 William Pocock Senior Operations Manager DICK'S Sporting Goods View Profile



Fellow Members BIO

[Go to Members P](#)

BIO OF Derek Carder



Derek Carder
Vice President of Customer Experience and Technical Operations
Geotab

derecarder@geotab.com
 702-553-7779

Favorite Quote: Good, better, best. Never let it rest. 'Til your good is better and your better is best. - St. Jerome

Professional Summary: Executive technical operations leader with over 10 years of experience in the creation of organization infrastructure that drives efficiency, security, and impeccable customer experience for internal and external users. Talent for identifying weaknesses in current support and technology application suites and implementing sustainable solutions in the support of the organizational goals. Proven success in consolidation of application platforms to reduce program redundancies, improve customer performance, create resiliency and to eliminate single points of failures. Track record of working with a coalition of resources to implement a more data secure and redundant infrastructure across expanding multi-datacenter environments. Known for global team-building, IT solutions development, and leading world-class teams to the delivery of organizational key performance indicators.

Areas of expertise: Customer Contact Strategy & Operations, Customer Interaction and Customer Experience, Customer Contact

Curated Content

Keynote and All-Star Presentation Videos

Event Presentation Slides

Virtual Meeting On Demand

Newsletters

Summaries and Chronicles



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FACE TO FACE MEETINGS



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Face to Face: Live Events

Click on each icon for more event details.



[Customer Experience Ecosystem: A Frost & Sullivan Executive MindXchange](#)



[4th Annual Sales Team Accelerator Retreat: A Frost & Sullivan Executive MindXchange](#)



[16th Annual Customer Contact East: A Frost & Sullivan Executive MindXchange](#)







[14th Annual Customer Contact Europe: A Frost & Sullivan Executive MindXchange](#)



[16th Annual Customer Contact West: A Frost & Sullivan Executive MindXchange](#)

Face to Face: Site Tours & Executive Roundtables

Host and Themes

Where We've Been		Where We're Going	
	<i>Omni Channel Customer</i>		<i>Effortless Agent Experience and Engagement</i>
	<i>Effortless Experience</i>		<i>October: Details Coming Soon</i>
	<i>Being Human: Making Emotional Connections in a Digital Economy</i>		
	<i>Digital Transformation and the Integration of Digital Channels into the Contact Center</i>		
	<i>Technology & Human Connection</i>		
	<i>Customer Service Excellence from a New Perspective</i>		
	<i>Effortless Customer Experience</i>		
	<i>Effortless Agent Experience</i>		
	<i>Effortless Customer Experience - European</i>		
			



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OVERVIEW OF BENEFITS



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Review of Benefits

Cross Functional, Cross-Industry Network of Peers

End User Priorities on Customer Engagement, Global Study

A Customer Engagement Leadership Council Benchmark Survey

Six Executive MindXchange Events

Annual Council Meeting

Voting on Council Critical Issues Topics

Site Tours & Executive Roundtables

Virtual Executive Assemblies

Virtual Deep Dive Calls

Virtual Executive Coaching Clinics w/ Michael O. "Coop" Cooper

European Site Tours & Executive Roundtables

European Virtual Executive Assemblies

Curated Content

Newsletters/eBulletins

eBroadcasts/Webinars

Membership Services Manager

Membership Services Manager



Brittney Gasca Pena

Our Membership Services liaison will provide you with concierge service, and ensure you fully leverage the Council and gain the greatest value of your membership.



Customer Engagement Leadership Council | Frost & Sullivan

