



# Customer Engagement Leadership Council

FROST & SULLIVAN

NAVIGATE THE FUTURE OF CUSTOMER ENGAGEMENT WITH CONFIDENCE



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## **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.

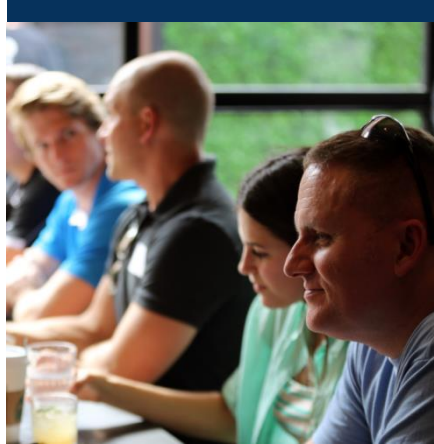
The Customer Engagement Leadership Council was founded as a member-driven organization. The Council serves as an enabler for business leaders to deepen customer engagement by focusing on the intersection of critical business and technology issues that will drive growth for themselves and their organizations.



# 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.

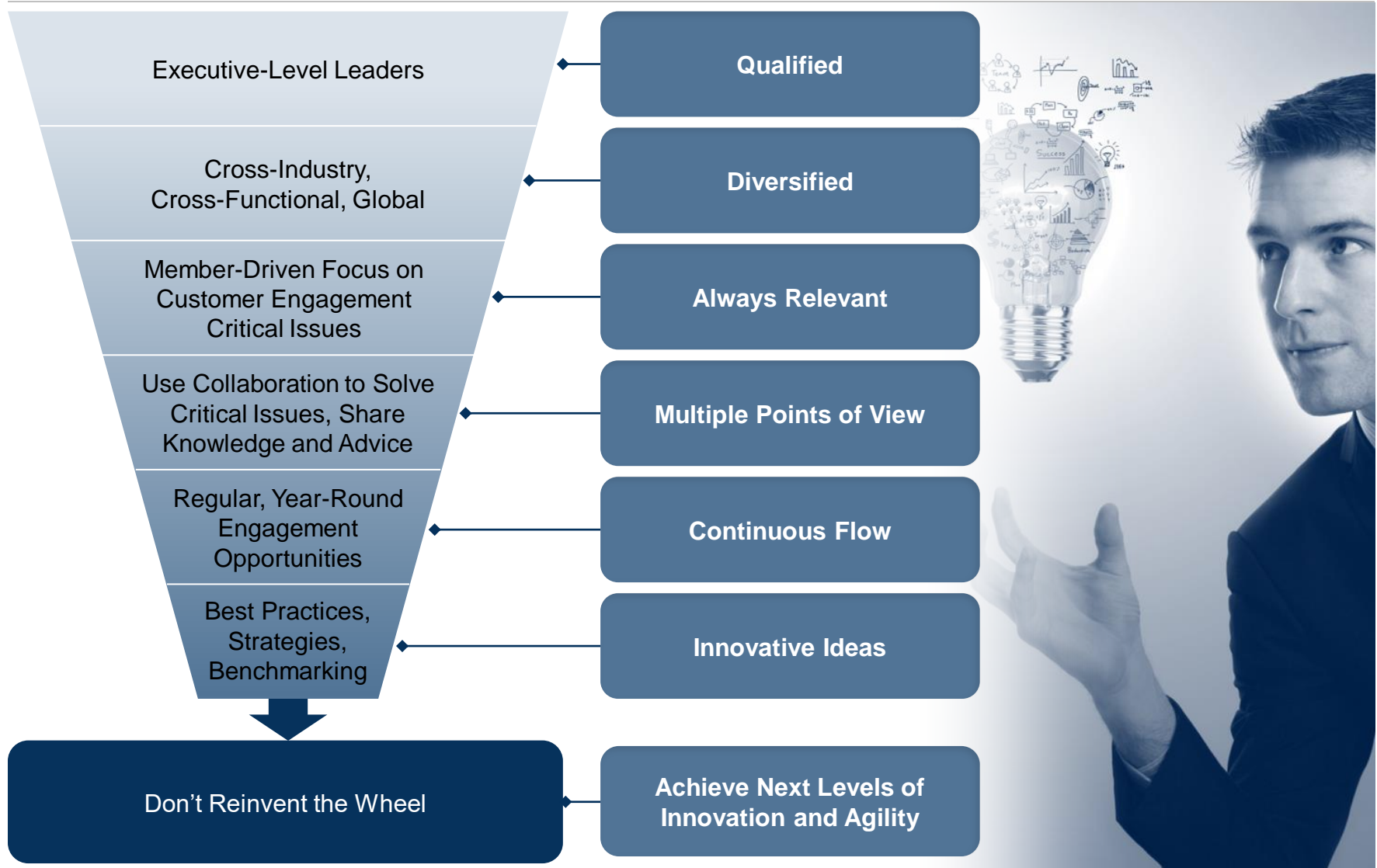


Executives want a platform with impactful insights from peers to **develop the next generation of leaders** from within their own teams.

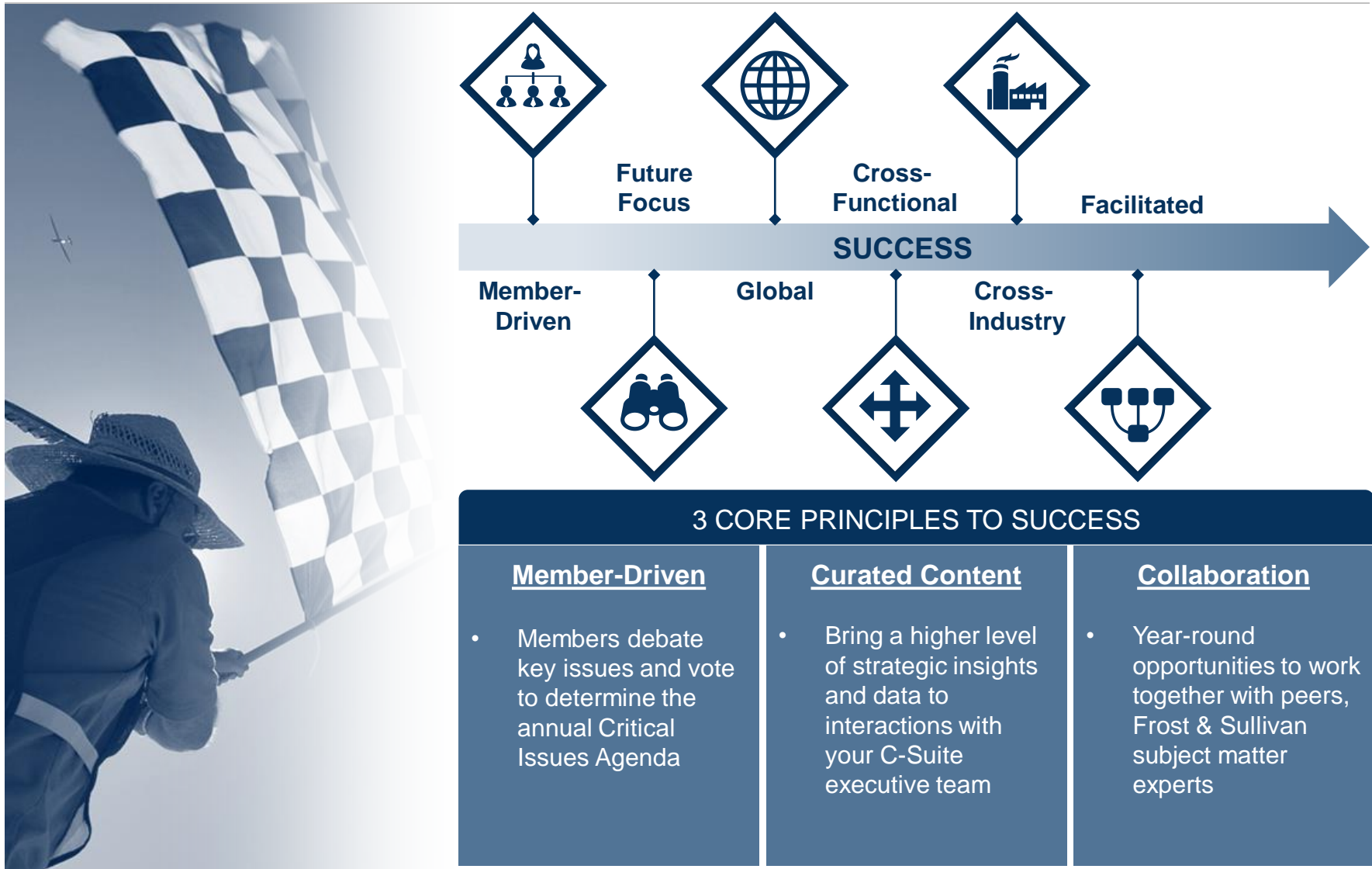


Executives are searching for **current thought leadership** – relevant content curated easily accessible for them.

# Value: Customer Engagement Leadership Council



# A Unique Value Proposition



## 3 CORE PRINCIPLES TO SUCCESS

### Member-Driven

- Members debate key issues and vote to determine the annual Critical Issues Agenda

### Curated Content

- Bring a higher level of strategic insights and data to interactions with your C-Suite executive team

### Collaboration

- Year-round opportunities to work together with peers, Frost & Sullivan subject matter experts



# 1

## MEMBER-VOTED CRITICAL ISSUES AGENDA

# 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.



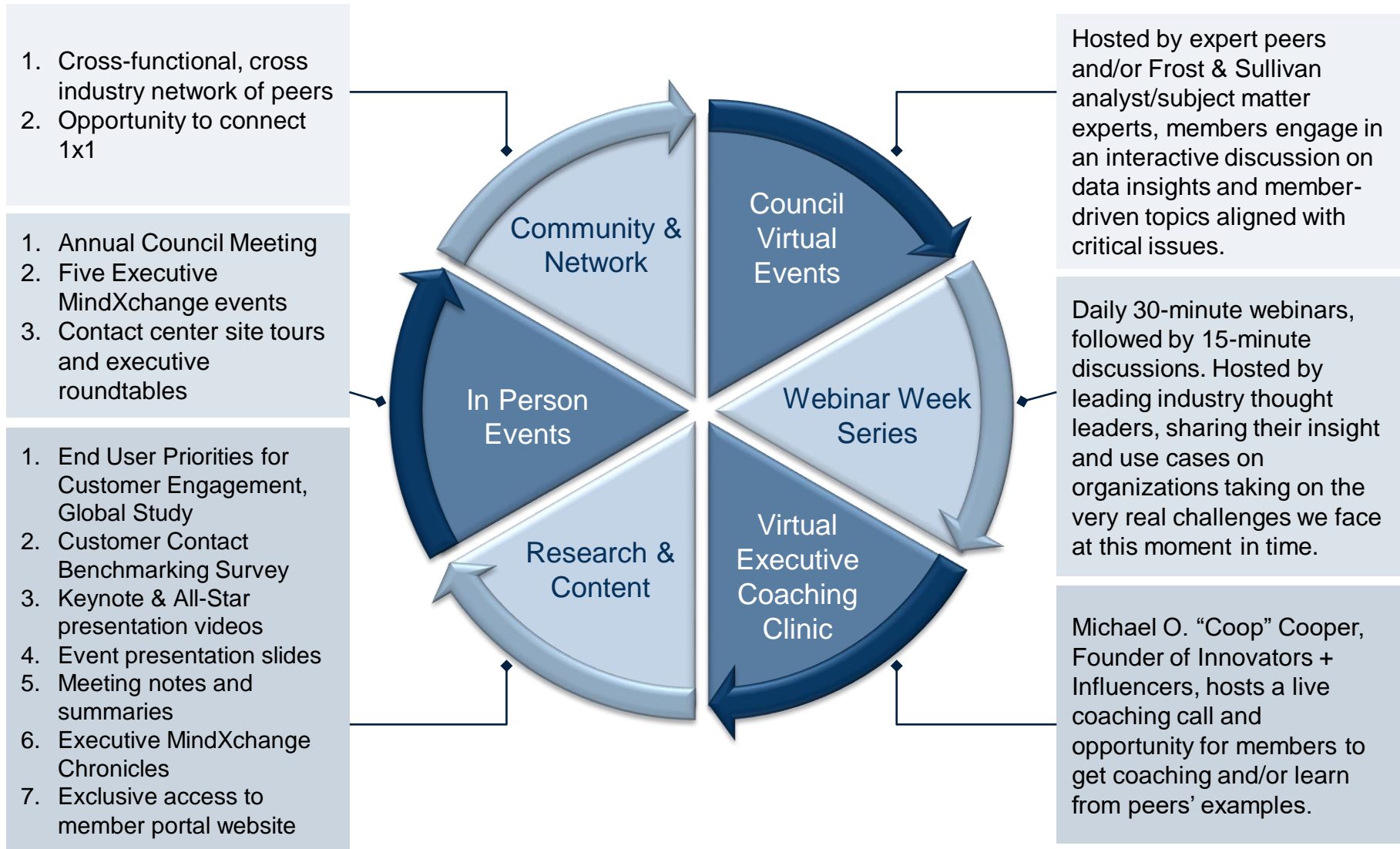
# 2

## CUSTOMER ENGAGEMENT LEADERSHIP COUNCIL PROGRAM BENEFITS



Customer Engagement  
Leadership Council  
FROST & SULLIVAN

# How We Do It - Program Benefits



## 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.



3

## CUSTOMER ENGAGEMENT LEADERSHIP COUNCIL MEMBERS

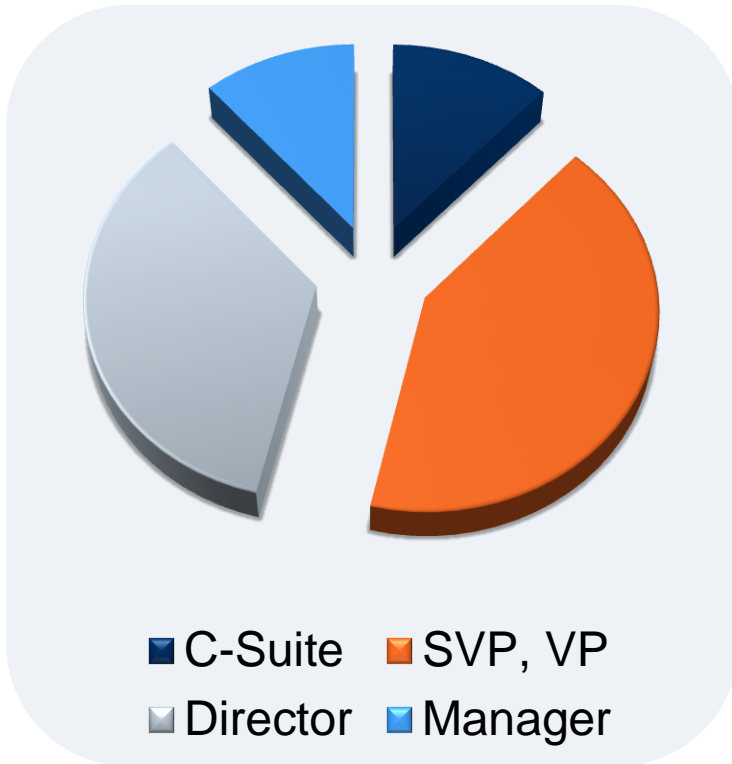


Customer Engagement  
Leadership Council  
FROST & SULLIVAN

# Community & Network: Extensive Global and Cross-Industry Membership

# 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**



# 4

## VIRTUAL EVENTS

# Webinar Week Series: Customer Contact

Brought to You During COVID-19

*Theme: Transitioning to a New Customer and Organizational Dynamic*

**June 15 - 18, 2020 | 11:00 AM EDT/15:00 GMT**

Daily 30-minute webinars followed by 15-minute exclusive, member-only discussions. This month features leading industry thought leaders sharing their insight and use cases on organizations taking on the very real challenges we face at this moment in time. [Click here for more details!](#)



**Monday, June 15**

**The Autonomous Customer 2020**

Nicola Millard, Principal Innovation Partner, Enterprise CTIO, BT



**Tuesday, June 16**

**The Challenge of Maintaining the Momentum of a New Way of Doing Business with Your Customers Post COVID-19**

Deb Zell, Director, UX/Service Design/Journey Management, Dell



**Wednesday, June 17**

**The Rise of Generation Novel aka Gen N and the Novel Economy**

Brian Solis, Global Innovation Evangelist, Salesforce



**Thursday, June 18**

**Business Continuity During Uncertain Times**

Chris Keenan, Head, Worldwide Medical Customer Engagement, Medical Capabilities, Bristol-Myers Squibb

# Webinar Week Series: Sales

## Theme: Sales Team Adapt and Reinvent

Brought to You During COVID-19

June 22 - 25, 2020 | 2:00 PM EDT/18:00 GMT

Daily 30-minute webinars followed by 15-minutes of roundtable discussion to help inspire your leadership teams to re-invigorate your sales and growth strategies during these turbulent times. Be sure to share session details with your sales executive colleagues. [Click here for more details!](#)

LegalBreeze



**Monday, June 22**

### **The Future of Customer Engagement**

Speaker: Mark Dean, Chief Strategy Officer, LegalBreeze, Former Head of Sales Development North America, LinkedIn



**Tuesday, June 23**

### **Three Perspectives for Hiring, Onboarding and Training Successful Sales Teams in the Wake of COVID-19**

Moderator: John Ruggles, Senior Vice President, Global Sales, Frost & Sullivan

Panelists:

Kyle Pottinger, Senior Vice President, Ticket Sales and Service, Phoenix Suns

Marek Wasilewski, Senior Vice President of Global Sales, Mavenir

Patrick Mulkey, Director of Training and Enablement, Gordon Food Service



THOMSON  
REUTERS

**Wednesday, June 24**

### **Streamlining for Success – Leveraging COVID-19 Best Practices for Operational Efficiency & Effectiveness**

Speaker: Robert Beattie, Vice President, Sales, Tax & Accounting Professionals Mid/Small Firms, Thomson Reuters

MORNINGSTAR®



IBM

**Thursday, June 25**

### **Looking Ahead: Three Best Practices for Driving Revenue in the New Normal**

Moderator: John Ruggles, Senior Vice President, Global Sales, Frost & Sullivan

Panelists:

Dave Goes, Senior Vice President, Morningstar Financial

William Sexton, Vice President, Sales Operations, Global Industrial

Rakhi Voria, Director, IBM Global Digital Sales Development, IBM

# Council Virtual Events



Facilitated and moderated interactive discussions led by a peer expert and/or a Frost & Sullivan analyst/subject matter expert

Engage in an easily accessible & collegial environment from anywhere in the world and gain understanding of cross-industry, global best practices

Harness collective knowledge from Council members on member-driven topics aligned with critical issues and/or analyze critical data insights and information for Benchmarking

# Previous Virtual Events

## We've Discussed



### End User Priorities for Customer Engagement, Global

Alpa Shah, Vice President of Research, Frost & Sullivan



### Artificial Intelligence

Kandy White, Senior Vice President, Global Operations



### Gig Economy and the Workforce of the Future

Jerry Leisure, Vice President of Customer Success



### Self Serve

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



### VOC Analytics (EU)

Nate Brown, Director of Customer Experience



### Omni Channel Customer

Nancy Jamison, Principal Analyst, ICT, Frost & Sullivan



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Nancy Jamison, Principal Analyst, ICT, Frost & Sullivan



### Effortless Customer Engagement Strategy (EU)

Dr. Nicola Millard, Principal Innovation Partner



### Disaster Recovery

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



### Mapping Root Cause for Proactive Solutions

Aisha Ponds, Director, Stakeholder Escalations

# Council Virtual Events – Coaching Clinics

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 Virtual Events



Virtual Event on Hiring for Brand Fit  
**June 11, 2020 | 11:00 AM EDT/15:00 GMT, Daily**



Webinar Week Series: Customer Contact – Transitioning to a New Customer and Organizational Dynamic  
**June 15 - 18, 2020 | 11:00 AM EDT/15:00 GMT, Daily**

- **Monday** – The Autonomous Customer 2020
- **Tuesday** – The Challenge of Maintaining the Momentum of a New Way of Doing Business with Your Customers Post COVID-19
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- **Thursday** – Looking Ahead: Three Best Practices for Driving Revenue in the New Normal



# 5

## RESEARCH & MEMBER PORTAL CONTENT

# 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.

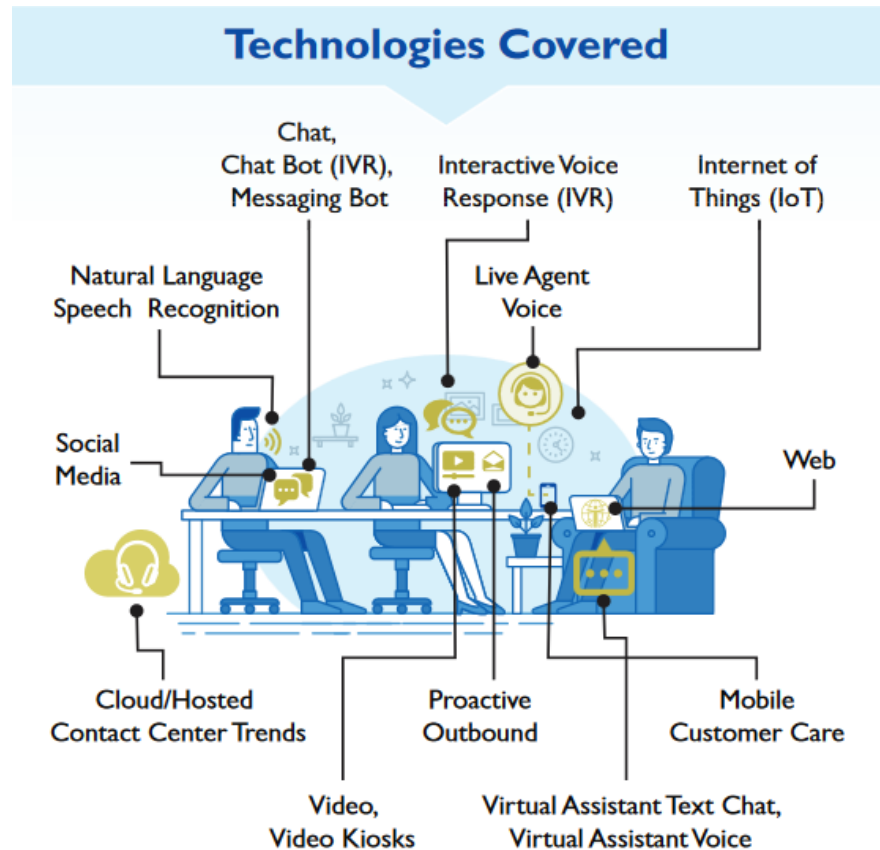
# Research – Frost & Sullivan’s End User Priorities for Customer Engagement, Global Study 2019

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

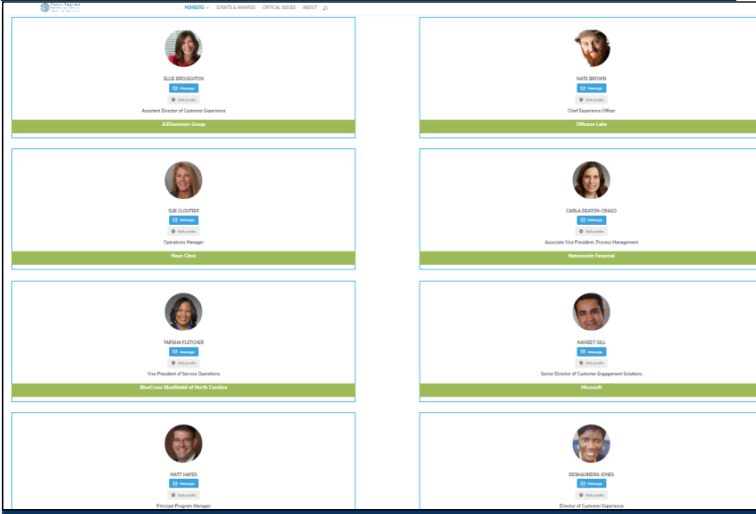
Available to you via a PDF, downloadable and shareable



# Member Portal - “Member Connections”

- Year-round access to fellow Council members & new private message feature to help connect real time
- Profiles include professional summary, areas of expertise, and contact information
- Helpful filters to search member profiles by region and by their area of expertise

## Directory of Council Members



## Filters

Expertise Areas



Account Type



Location

More filters

## Individual Profiles

A screenshot of an individual member profile for Nate Brown. The profile includes a circular profile picture, the name 'Nate Brown', and a bio: 'Lover of all things Customer Experience and Customer Service!'. Below the bio is a 'Message' button. The profile is divided into sections: 'TITLE' (Chief Experience Officer), 'COMPANY' (Officium Labs), 'E-MAIL ADDRESS' (nbrown@officiumlabs.io), 'PHONE NUMBER' (6157073004), 'LOCATION' (Nashville, TN), 'FAVORITE QUOTE' ('Sorry, Goose, but it's time to buzz the tower.' - Maverick), and 'PROFESSIONAL SUMMARY' (a paragraph about his career in customer experience). At the bottom, there is a section for 'EXPERTISE AREAS' (Customer Contact Strategy, Customer Experience Strategy, Agent Experience and Engagement, Outsourcing) and 'I'M SEEKING INSIGHTS ON...'. A 'Message' button is also visible in the top right corner of the profile card.

## Private Message

Message

# Member Portal – “Content Library”



MEMBERS ▾ EVENTS & AWARDS CRITICAL ISSUES ABOUT 🔍

Search the content library

**Now Available – Keyword Search!** 🔍



[Critical Issues](#)



[Videos](#)



[Customer Engagement Benchmark Survey](#)



[Executive MindXchange Events](#)



[Virtual Events On Demand](#)



[Newsletters](#)



6

## IN PERSON EVENTS

# In Person 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 Virtual: 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](#)



# In Person Events: Site Tours & Executive Roundtables Host and Themes

Where We've Been	Where We're Going
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	<i>Omni Channel Customer</i>
	<i>Effortless Experience</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 &amp; 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>
	
	

	<i>Effortless Agent Experience and Engagement</i>
	<i>October: Details Coming Soon</i>



# 7

## OVERVIEW OF BENEFITS

# 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

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## 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

