



Customer Engagement  
Leadership Council  
FROST & SULLIVAN

**NAVIGATE THE  
FUTURE OF  
CUSTOMER  
ENGAGEMENT  
WITH CONFIDENCE**

*The Growth Pipeline™ Company  
Powering clients to a future shaped by growth*

# 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.

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.

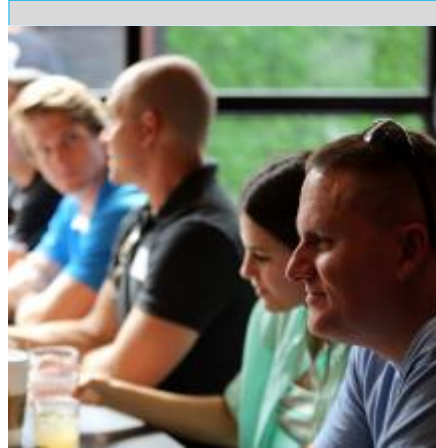
Two Customer Contact Executive MindXchange Events launched in the US; One launched in Europe.



# 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.

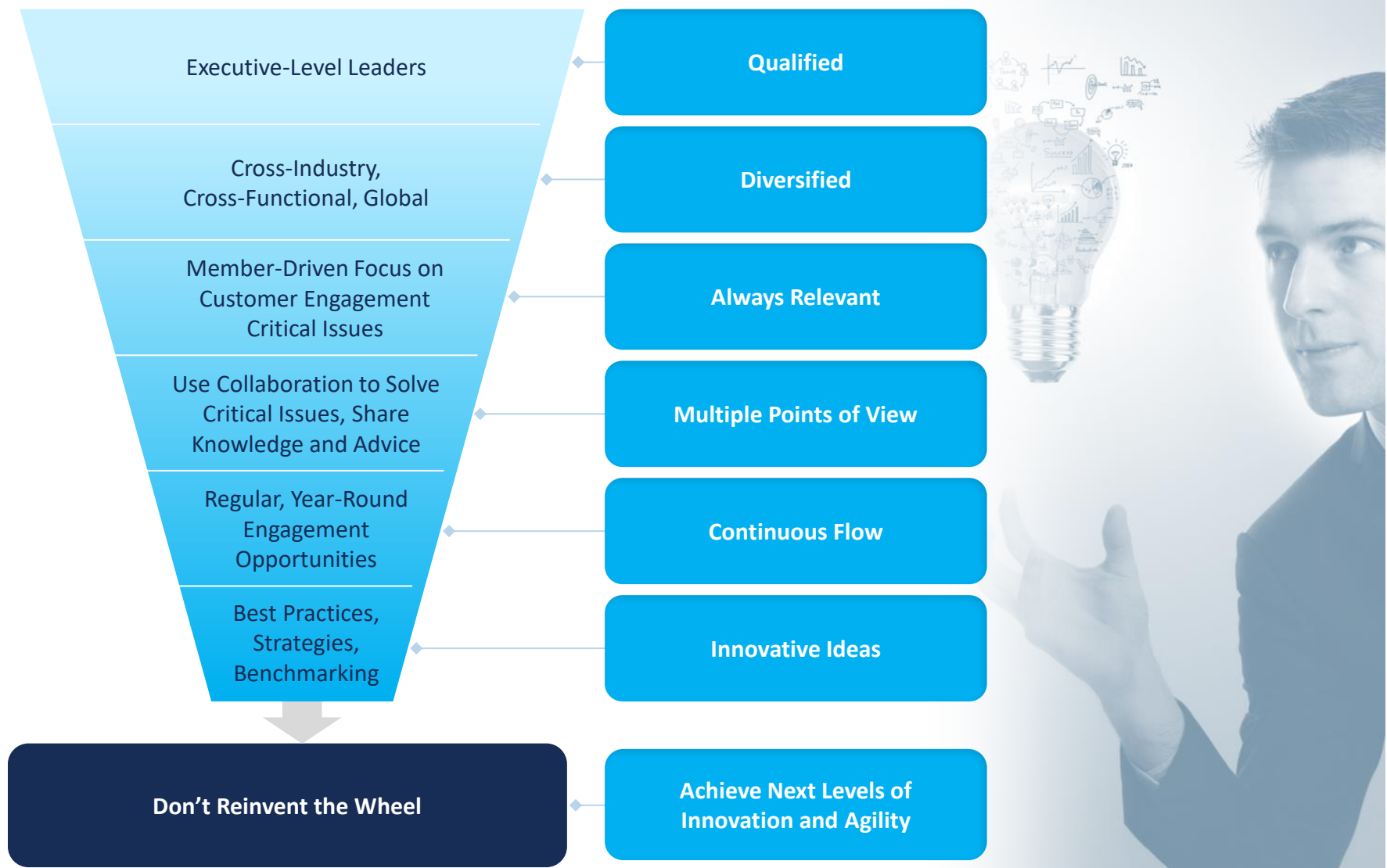


Executives want a platform with impactful insights from peers to **develop the next generation of leaders** from within their own teams.

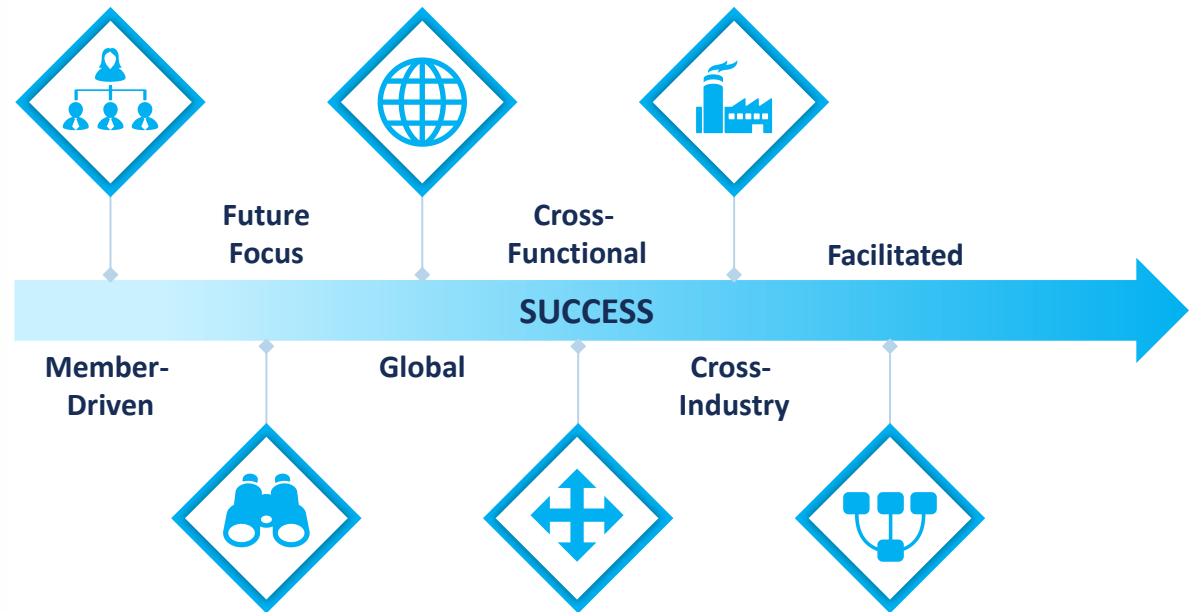


Executives are searching for **current thought leadership** – content both relevant and easily accessible.

# THE VALUE:



# 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





Customer Engagement  
Leadership Council  
FROST & SULLIVAN

# MEMBER-VOTED CRITICAL ISSUES AGENDA

# ANNUAL COUNCIL MEETING\*

\*Now VIRTUAL!



October 2020

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 member-only portal. Setting the Critical Issues Agenda is a key role in ensuring the content for the Council is driven by its members.



## Predictive, Proactive, and Personal Care

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

## Operational, Efficiency and Effectiveness

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

## 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.

## Effortless Agent Experience

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

## Automation

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

## Transformational Talent

Building external ecosystems are essential for future innovation that enables sustainable outcomes.



Customer Engagement  
Leadership Council  
FROST & SULLIVAN

# PROGRAM BENEFITS

# 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 and/or Frost & Sullivan analyst/subject matter experts, members engage in an interactive discussion on data insights and member-driven topics aligned with critical issues.

Daily 30-minute webinars, followed by 15-minute discussions. Hosted by 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.

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 leaders and/or business executives within your organization to join you 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.





Customer Engagement  
Leadership Council  
FROST & SULLIVAN

# COUNCIL MEMBERS

# COMMUNITY & NETWORK: EXTENSIVE GLOBAL & CROSS-INDUSTRY MEMBERSHIP





- C-Suite
- SVP, VP
- Director
- Manager

## 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



**ROB GOFOURTH**

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



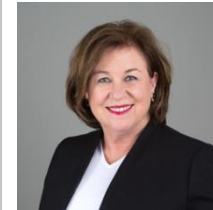
**WILLA HIGHTOWER**

Director of Strategic Planning  
Exelon



**JAMIE LANCASTER**

Vice President, Contact Center  
Kroger



**CATHY MARINO**

Senior Director, Customer Care  
Bristol-Myers Squibb



**ERIN MCMILLAN**

Assistant Vice President,  
Customer Operations  
AutoTrader



**ANTHONY MURDOCK**

Director, Customer Billing,  
& Revenue Assurance  
WGL

# 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*



Customer Engagement  
Leadership Council  
FROST & SULLIVAN

# VIRTUAL EVENTS



VIRTUAL  
EVENT

# CUSTOMER CONTACT VIRTUAL

A Frost & Sullivan Executive MindXchange

January 19-21, 2021

Join us for  
An "EXCLUSIVE & PURPOSELY ATYPICAL" Experience  
Strategy and Tactics for Extraordinary Times



An amazing speaker lineup to provide take-aways and best practices that you can apply at your organization. All LIVE, nothing pre-recorded! The event will include:

- Face-to-face sessions and networking
- Live polling and real-time chats
- Virtual exhibit hall, demos, and the opportunity to win tons of prizes
- Yoga breaks
- and YES – the Olympics!

We will focus on delivering **Strategy and Tactics for Extraordinary Times** with three tracks and over a dozen interactive sessions that empower you to have actual conversations with each other about your challenges.

# 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

	<p><b>End User Priorities for Customer Engagement, Global</b> Alpa Shah, Vice President of Research, Frost &amp; Sullivan</p>
	<p><b>Artificial Intelligence</b> Kandy White, Senior Vice President, Global Operations</p>
	<p><b>Gig Economy and the Workforce of the Future</b> Jerry Leisure, Vice President of Customer Success</p>
	<p><b>Self Serve</b> Aarde Cosseboom, Senior Director of GMS Technology, Analytics, and Product</p>
	<p><b>VOC Analytics (EU)</b> Nate Brown, Director of Customer Experience</p>
	<p><b>Omni Channel Customer</b> Nancy Jamison, Principal Analyst, ICT, Frost &amp; Sullivan</p>
	<p><b>Effortless Customer Engagement Strategy (EU)</b> Dr. Nicola Millard, Principal Innovation Partner</p>
	<p><b>Disaster Recovery</b> J.C. Jones, Business Leader, Customer Relationship Management, Progressive Insurance Michael Durbin, Director, Capacity and Operations, Progressive Insurance</p>
	<p><b>Mapping Root Cause for Proactive Solutions</b> Aisha Ponds, Director, Stakeholder Escalations</p>

# COUNCIL VIRTUAL EVENTS – COACHING CLINICS

Executive Coaching with the  
Founder of

 **Innovators + Influencers**

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



Council Virtual Event: Coaching Clinic  
**October 21, 2020 | 1:00 – 2:00 PM EDT/17:00 – 18:00 GMT**



Webinar Series: Sales – Accelerating Complex Sales Cycles with Video  
**October 27, 2020 | 11:00 AM – 12:00 PM EDT/15:00 – 16:00 GMT**  
<https://www.starmindxchange.com/webinar/star-october/>



Virtual Annual Council Meeting: 2021 Critical Issues Agenda  
**October 28, 2020 | 11:00 AM – 1:00 PM EDT/15:00 – 17:00 GMT**  
Gather, virtually, for the official Customer Engagement Leadership Council Annual Meeting. Catch up and discuss the emerging [Critical Issues](#) for 2021.



Customer Contact VIRTUAL: A Frost & Sullivan Executive MindXchange | Council Meeting and Mixer  
**January 18, 2021 | 5:15 PM EDT/21:15 GMT**  
Members check in with one another, take a breather, and shoot the... breeze!



Customer Contact VIRTUAL: A Frost & Sullivan Executive MindXchange  
**January 19 - 21, 2021 | 1:00 – 5:30 PM EDT/17:00 – 21:30 GMT, daily**  
<https://www.customercontactmindxchange.com/virtualjan/> - see additional details, [here](#)



Customer Contact VIRTUAL: A Frost & Sullivan Executive MindXchange | Council Take-Aways Pow Wow  
**January 21, 2021 | 12:15 PM EDT/16:15 GMT**  
There's been a lot to digest at Customer Contact VIRTUAL: A Frost & Sullivan Executive MindXchange! This time is for members to convene and share their "ah ha" moments and golden nuggets with one another.



# 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

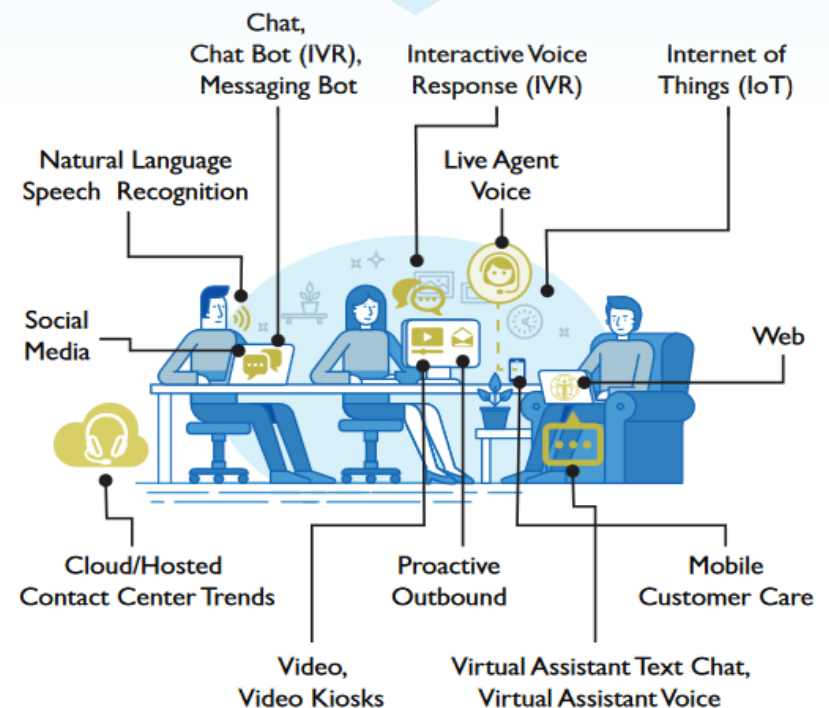
WANT MORE DATA ON CUSTOMER EXPERIENCE TRENDS AND CONTACT CENTER METRICS?

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

## Technologies Covered





# 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

The screenshot shows a grid of member profiles. Each profile includes a circular profile picture, the member's name, title, and a 'Message' button. The members listed are:

- ELISE BRIDGEMAN, Assistant Director of Customer Experience, Advertiser Group
- NATE BROWN, Chief Experience Officer, Officium Labs
- ELISE CLAYTON, Operations Manager, Media One
- CARLA BEATRIZ CRISTO, Associate Vice President, Process Management, Technology Resources
- TARJANA ALDRIDGE, Vice President of Service Operations, Best Case Recruitment of North Carolina
- NAREY GILL, Senior Director of Customer Engagement Solutions, Microsoft
- MATT HARTZ, Principal Program Manager, Microsoft
- EDUARDO ANDES, Director of Customer Experience, Microsoft

## Individual Profiles

The screenshot shows the individual profile for Nate Brown. It includes a profile picture, name, and title. Below the profile picture is a 'Message' button. The profile details are as follows:

- TITLE:** Chief Experience Officer
- COMPANY:** Officium Labs
- E-MAIL ADDRESS:** nbrown@officiumlabs.io
- COMPANY LOGO:** Officium
- PHONE NUMBER:** 6157573004
- LOCATION:** Nashville, TN
- FAVORITE QUOTE:** "Sorry, Goose, but it's time to buzz the tower." - Maverick
- PROFESSIONAL SUMMARY:** Nate Brown is a perpetual student of the world's greatest experiences and the people who create them. Having spent the first decade of this career managing a complex technical support environment for Occupational Health and eLearning software, Nate transitioned to Customer Experience in 2015. He was dubbed the "CX Influencer of the Year" by Cloudferry in 2019, as well as being named a top CX thought leader by TruRating, Qminder, ProcedureFlow, LifeHelpNow, ICML, and Exceeders. As a passion project, Nate recently created CX Accelerator, a first-class virtual community for Customer Experience professionals. Nate currently serves as the Chief Experience Officer for Officium Labs and can be found at a variety of conferences speaking and training on the CX topics he loves.
- EXPERTISE AREAS:** Customer Contact Strategy, Customer Experience Strategy, Agent Experience and Engagement, Outsourcing
- FM SEEKING INSIGHTS ON:**

## Private Message

The screenshot shows a blue button with a white envelope icon and the text "Message".

## Filters

More filters ▲

- Expertise Areas ▼
- Account Type ▼
- Location ▼

# MEMBER PORTAL: "CONTENT LIBRARY"

Search the content library

Keyword Search!



Critical Issues



Videos



Customer Engagement Benchmark Survey



Executive MindXchange Events



Virtual Events On Demand



Newsletters



Customer Engagement  
Leadership Council  
FROST & SULLIVAN

# 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



17th Annual Customer Contact East: A Frost & Sullivan Executive MindXchange



14th Annual Customer Contact Europe: A Frost & Sullivan Executive MindXchange



17th Annual Customer Contact West: A Frost & Sullivan Executive MindXchange





# IN-PERSON EVENTS: SITE TOURS & EXECUTIVE ROUNDTABLES HOST & THEMES

## Where We've Been

	Omni Channel Customer
	Effortless Experience
	Being Human: Making Emotional Connections in a Digital Economy
	Digital Transformation and the Integration of Digital Channels into the Contact Center
	Technology & Human Connection
	Customer Service Excellence from a New Perspective
	Effortless Customer Experience
	Effortless Agent Experience
	Effortless Customer Experience - European
	
	

## Where We're Going

	Effortless Agent Experience and Engagement
	2021: Details Coming Soon

# OVERVIEW OF BENEFITS



Customer Engagement  
Leadership Council  
FROST & SULLIVAN





# REVIEW OF BENEFITS

Cross Functional, Cross-Industry Network of Peers
Associate Memberships
Monthly Webinar Week Series
Council Virtual Events
Council Virtual Event: Coaching Clinics w/ Michael O. “Coop” Cooper
European Site Tours & Executive Roundtables
European Council Virtual Events
Members-Only Portal and Content Library
Newsletters/eBulletins
End User Priorities on Customer Engagement, Global Study
A Customer Engagement Leadership Council Benchmark Survey
Five Executive MindXchange Events
Annual Council Meeting
Voting on Council Critical Issues Topics
Site Tours & Executive Roundtables

# 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 from your membership.



CUSTOMER ENGAGEMENT LEADERSHIP  
COUNCIL | FROST & SULLIVAN



Customer Engagement  
Leadership Council  
FROST & SULLIVAN