



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

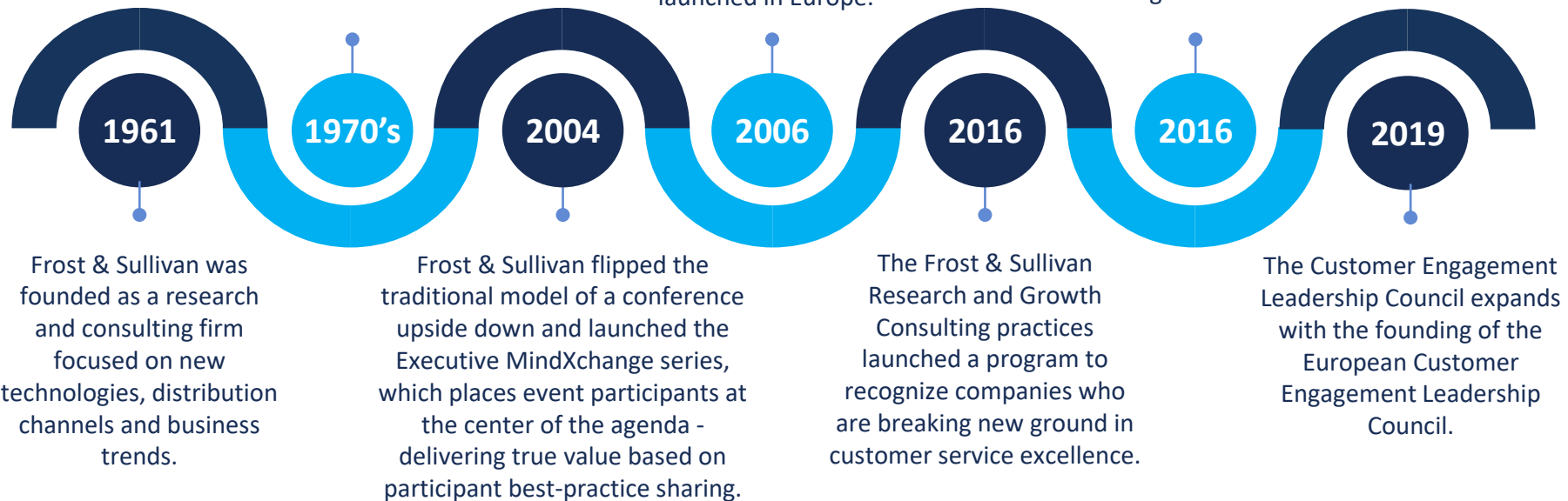
- Introductions
- History – Then & Now
- The Purpose & Value
- What We Do – Member Voted Critical Issues
- Community & Network
- How We Do It – Deliverables & Collaboration
- Overview of the Council Program
- Q&A, Next Steps

# 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.

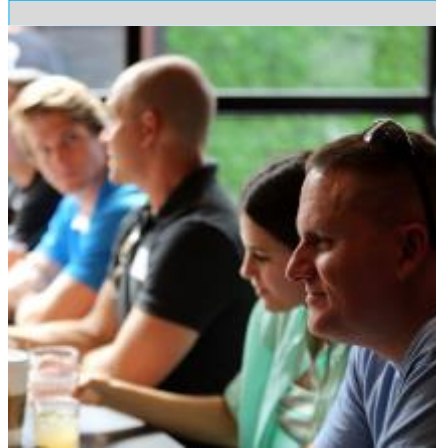
Two Customer Contact Executive MindXchange Events launched in the US; One launched in Europe.



# 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.

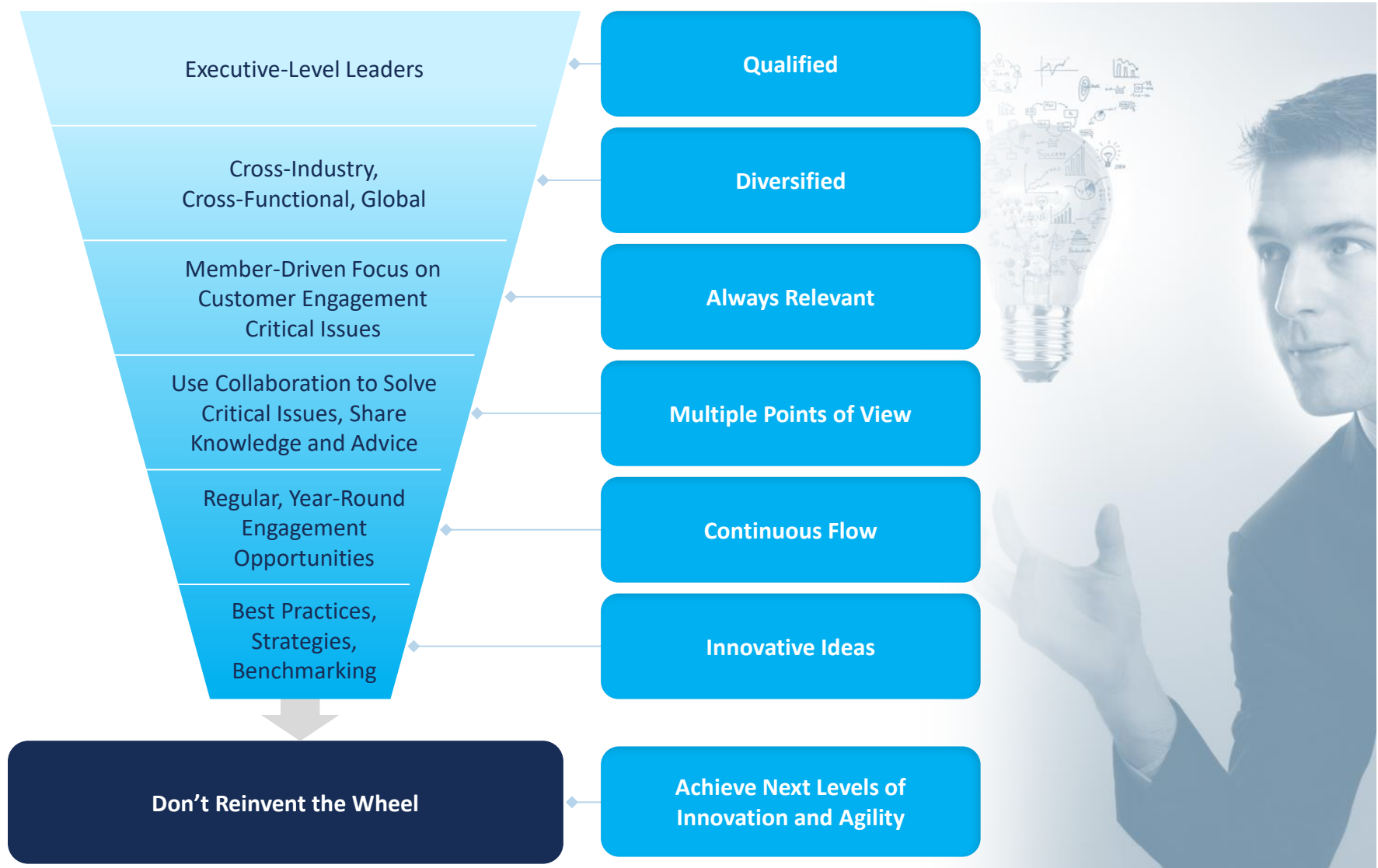


Executives want a platform with impactful insights from peers to **develop the next generation of leaders** from within their own teams.

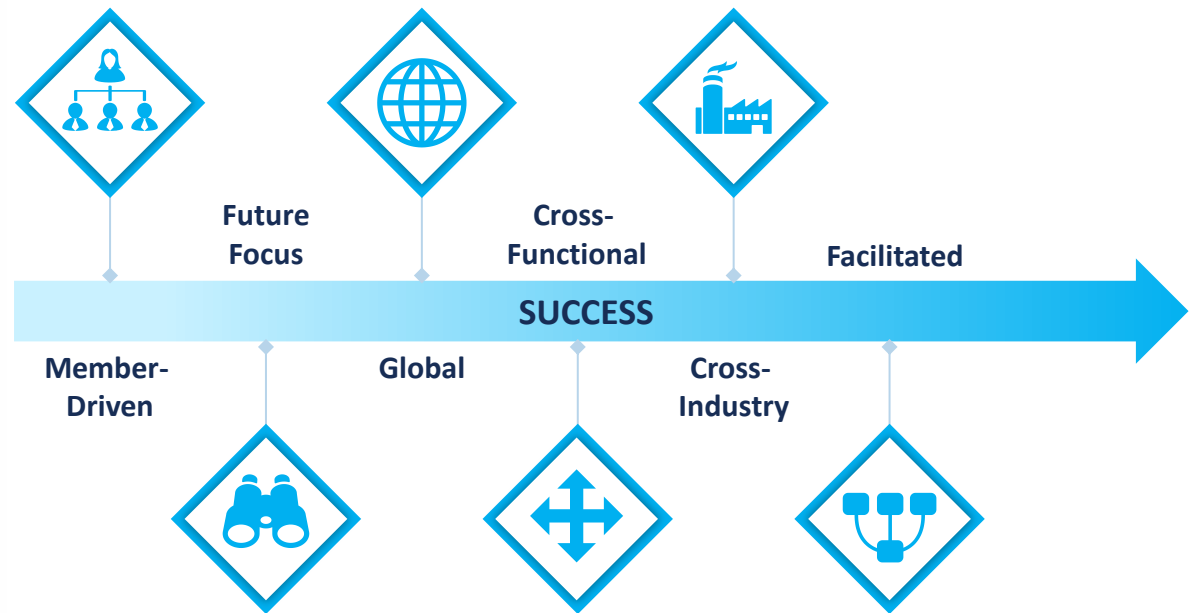


Executives are searching for **current thought leadership** – content both relevant and easily accessible.

# 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



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# MEMBER-VOTED CRITICAL ISSUES AGENDA

# ANNUAL COUNCIL MEETING\*

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



October 2021 – 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 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

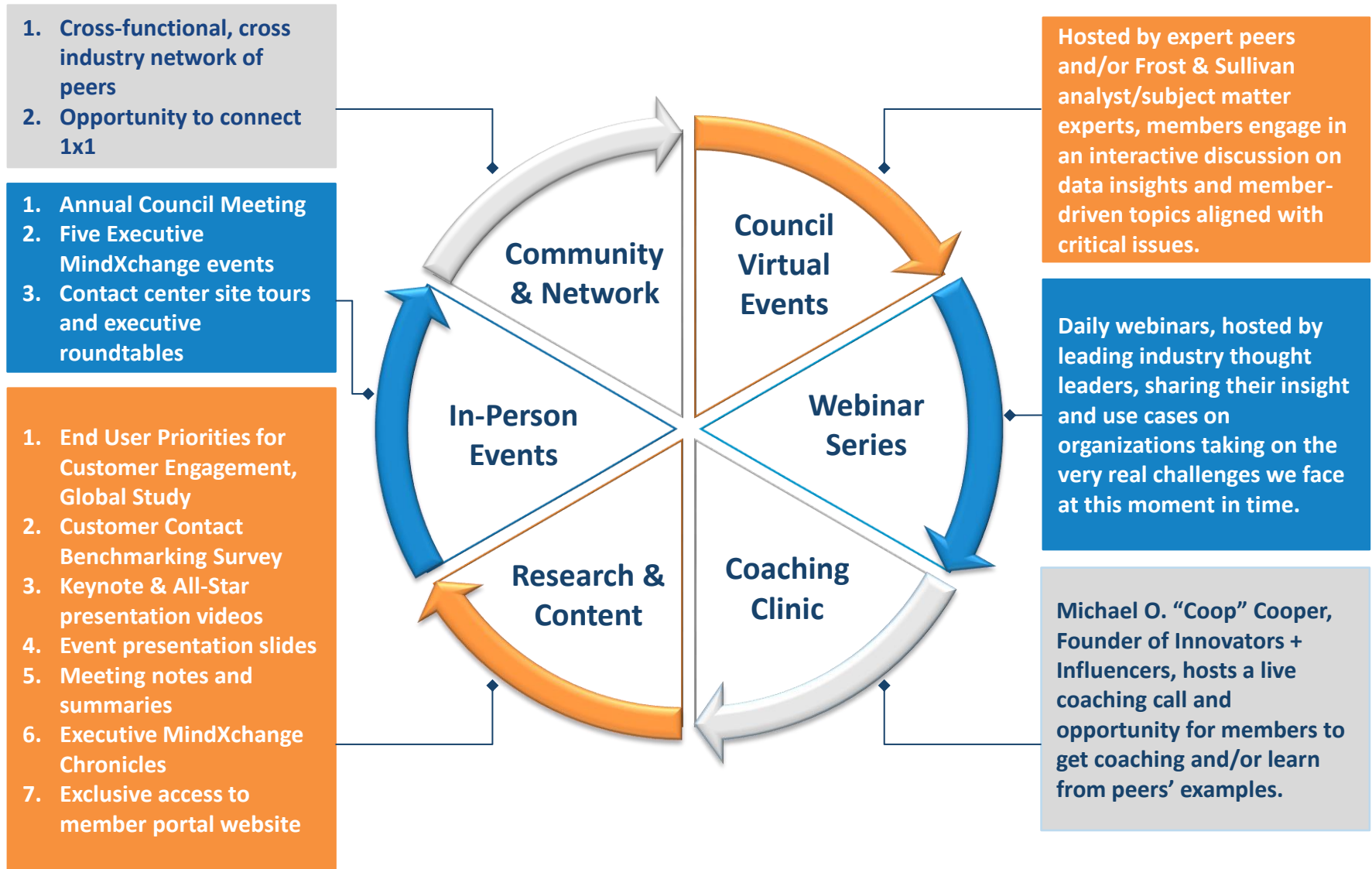
Building external ecosystems are essential for future innovation that enables sustainable outcomes.



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# PROGRAM BENEFITS

# HOW WE DO IT: PROGRAM BENEFITS



# ASSOCIATE MEMBERSHIP

Designate up to 5 leaders and/or business executives within your organization to join you as an associate member.



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“I really appreciate how easy you have made this onboarding process for us!”

- *Customer Care Center Director,  
State Farm Insurance Companies*

## 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.

# 2021 B2B MARKETING BENCHMARK SURVEY

## Marketers are prioritizing investing in **RELATIONSHIP BUILDING TACTICS**.

1

### Webinars

56% of marketers plan to increase **Webinars** investment next year.



2

### Account-Based Marketing

55% of marketers plan to increase **Account-Based Marketing** investment next year.



3

### Social Media (Non-Paid)

54% of marketers plan to increase **Social Media** investment next year.



4

### Content Marketing

52% of marketers plan to increase **Content Marketing** investment next year.



**LEAD CONVERSION** is the biggest challenge marketers are working to overcome.

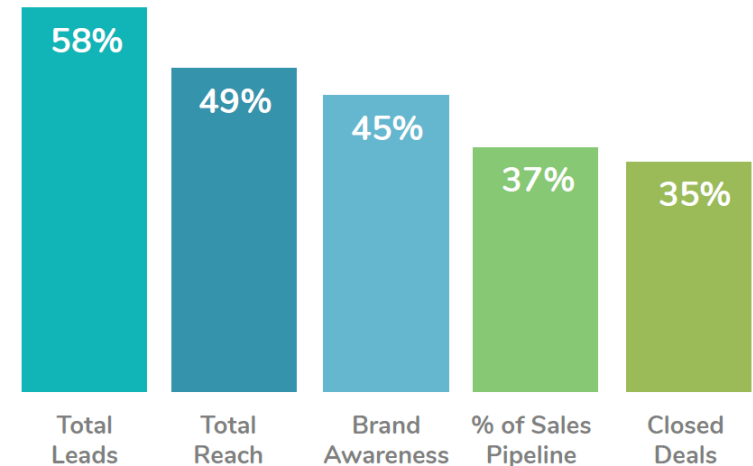


37%

of surveyed marketers said that **tracking conversions** is their greatest lead conversion challenge.

Marketers care about lead conversion because they are increasingly measured by the **SALES TEAM'S SUCCESS**

### How marketers are measured



B2B marketing leaders across all industries take part in Frost & Sullivan's 2021 B2B Marketing Benchmark Survey to measure their performance against their peers.



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# COUNCIL MEMBERS

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

				
				
				
				
		 <p>Customer Engagement Leadership Council FROST &amp; SULLIVAN</p>		



■ 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



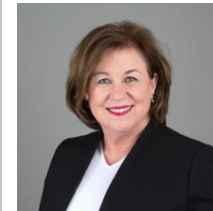
**WILLA HIGHTOWER**

Director of Strategic Planning  
Exelon



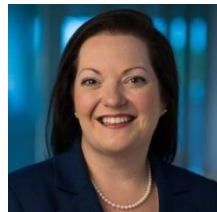
**JAMIE LANCASTER**

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**



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# VIRTUAL EVENTS

VIRTUAL  
EVENT

# CUSTOMER CONTACT VIRTUAL

A Frost & Sullivan Executive MindXchange  
January 26-28, 2021

## 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 halls, 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.

VIRTUAL  
EVENT

# CUSTOMER CONTACT VIRTUAL

A Frost & Sullivan Executive MindXchange  
January 26-28, 2021

## WORDS FROM PREVIOUS ATTENDEES...

“I like F&S because it's less about the sales pitch and more about collaboration of ideas.”

- *Director, Technology, New Avon Company*

“This was a major event with so many moving parts. I was highly impressed!... This is hands down, the best virtual event layout, support and seamless experience I have ever had.”

- *Continuous Improvement Supervisor, Homesite Insurance*

“Once again Frost & Sullivan hosts another amazing event. This time turning a sometimes boring virtual event, into an engaging event filled with impromptu dance parties, interactive games/event, and educational learning sessions. I highly recommend their events to anyone who is looking to learn and participate in a community of like-minded professionals.”

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



Agent Engagement and Effectiveness



Channel Strategy and Implementation



Building Deeper Customer Relationships

# COUNCIL VIRTUAL EVENTS

ONE-HOUR EVENTS – MADE TO MEET YOUR NEEDS AND YOUR SCHEDULE



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

FROST & SULLIVAN

**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

TechStyle  
Fashion  
Group

**Self Serve**  
Aarde Cosseboom, Senior Director of GMS Technology, Analytics, and Product

FROST & SULLIVAN

**Omni Channel Customer**  
Nancy Jamison, Principal Analyst, ICT, Frost & Sullivan

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

# 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.



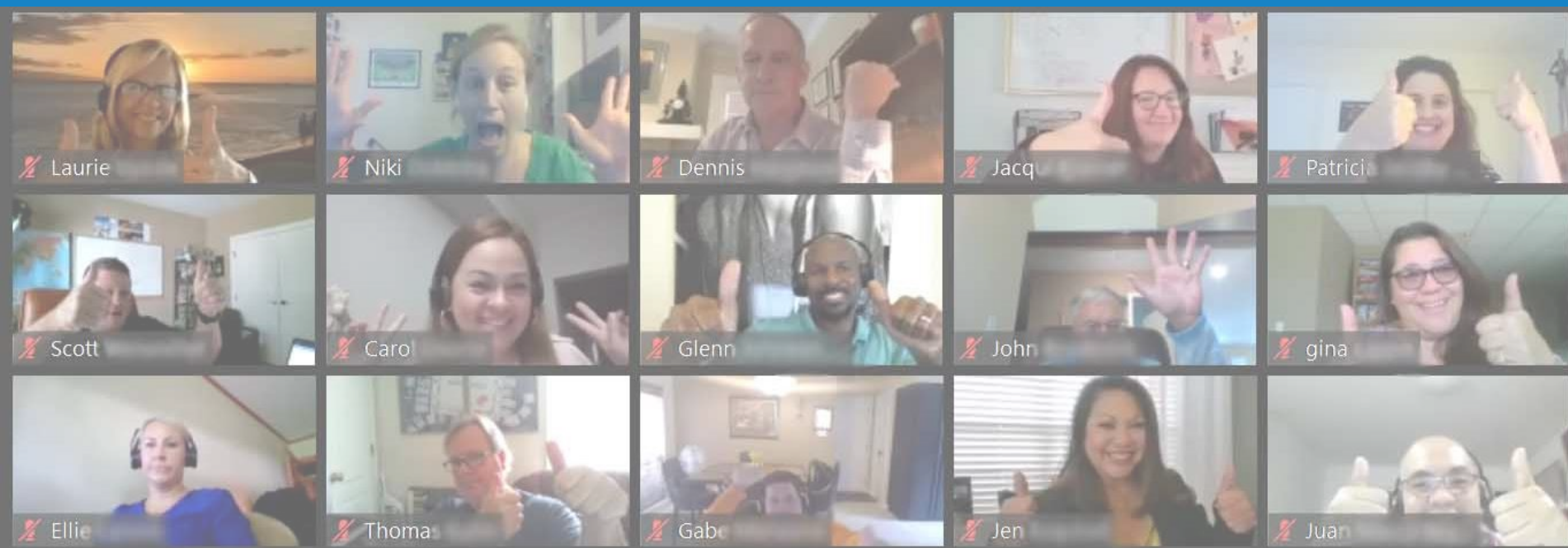
# UPCOMING VIRTUAL EVENTS

EVENTS MADE TO MEET YOUR NEEDS



Customer Contact VIRTUAL: A Frost & Sullivan Executive MindXchange  
January 26 - 28, 2021 | 1:00 – 4:30 PM EDT, daily

<https://www.customercontactmindxchange.com/virtualjan/> - see additional details, [here](#) 





# RESEARCH & MEMBER PORTAL CONTENT



# RESEARCH: 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.

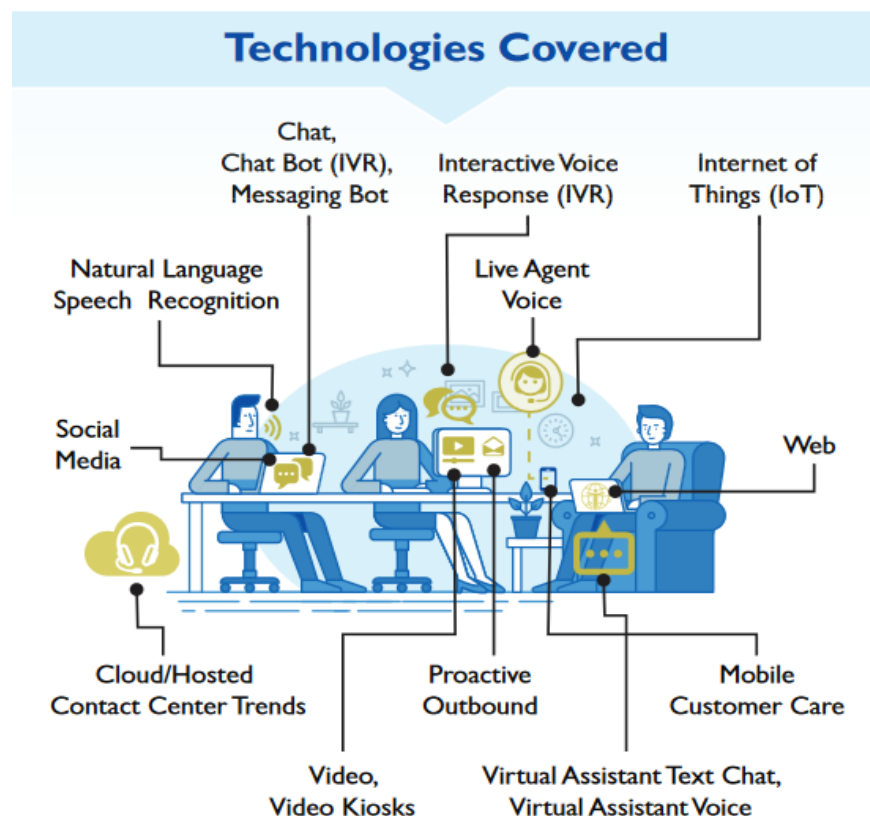
# RESEARCH: FROST & SULLIVAN'S END USER PRIORITIES FOR CUSTOMER ENGAGEMENT, GLOBAL STUDY 2019

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

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 profiles are arranged in two columns and four rows.

## Individual Profiles

The screenshot shows the individual profile for Nate Brown. It includes a profile picture, name, title (Chief Experience Officer), company (Officium Labs), and a 'Message' button. Below the profile information are sections for E-MAIL ADDRESS, PHONE NUMBER, LOCATION, FAVORITE QUOTE, and PROFESSIONAL SUMMARY.

## Private Message

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

## Filters

The screenshot shows the filters section with three dropdown menus: 'Expertise Areas', 'Account Type', and 'Location'. There is a 'More filters' link on the right.

# 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



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# IN-PERSON EVENTS

# IN-PERSON AND HYBRID 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



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# REVIEW OF BENEFITS

Cross Functional, Cross-Industry Network of Peers
Associate Memberships
Webinar 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.



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