



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

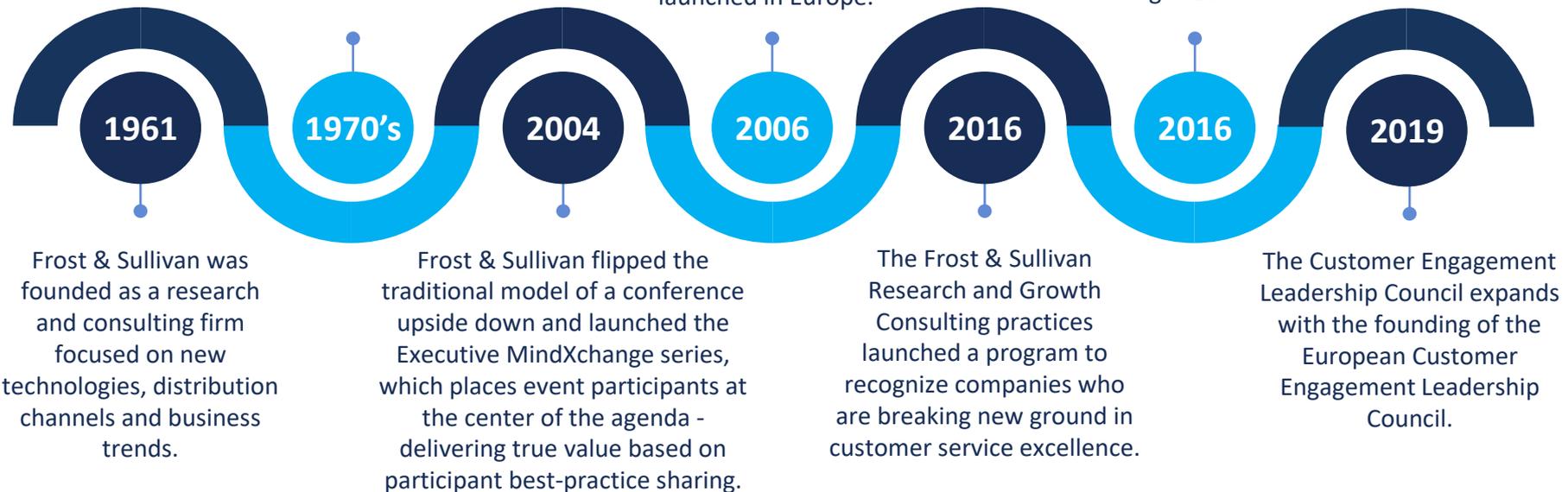
- Introductions
- Origination: Then & Now
- Our Shared Mission
- Council Members: Community & Network
- Designed to Support You: Strategic Objectives
- What We Do: Member Voted Critical Issues
- How We Do It: Deliverables & Collaboration
- Team Benefits
- Investment

# 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 U.S.; 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.



# OUR SHARED MISSION: GROWTH

Member-Driven ● Global ● Future Focus



Cross-Functional ● Facilitated ● Cross-Industry



SUCCESS



Executives want an opportunity to **continuously engage with a cross-industry network of peers** to explore future focused critical issues.



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



Executives are searching for **current thought leadership** to bring a higher level of strategic insights and data to interactions with senior management and the C-Suite.



**COUNCIL MEMBERS**



Personal  
Enrichment



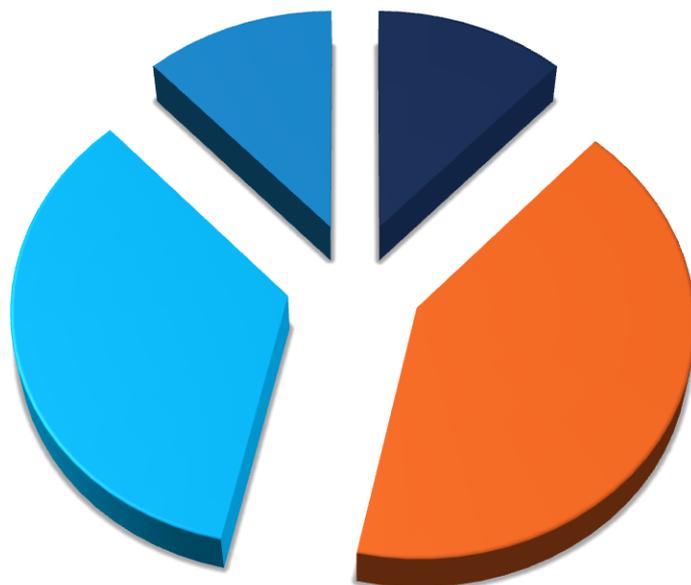
Corporate  
Growth

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

		 Customer Engagement Leadership Council FROST & SULLIVAN		



# COMMUNITY & NETWORK: DEMOGRAPHICS



■ 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 and Communication Technologies
- Travel and Hospitality

## FUNCTIONAL ROLES REPRESENTED

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



# COMMUNITY & NETWORK: MEMBER SNAPSHOT



**STEVE FLORENCE**

AVP – Customer Care Center  
State Farm



**ROB GOFOURTH**

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



**WILLA HIGHTOWER**

Director of Strategic Planning  
Exelon



**CATHY MARINO**

Senior Director, Customer Care  
Bristol-Myers Squibb



**LAUREN MEYER**

Assistant Vice President  
National Contact Center Operations  
Safelite Group



**ANTHONY MURDOCK**

Director, Customer Billing,  
& Revenue Assurance  
WGL



**DESIGNED TO SUPPORT YOU**

/Administration  
/Human Resources  
/Legal  
/Accounting  
/Finance  
/Marketing  
/Publicity

/Promotion  
/Research  
/Business  
/Development  
/Engineering  
/Manufacturing  
/Planning

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# STRATEGIC OBJECTIVES



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## Propelling Leadership & Recurring Inspiration

Each year, Council members work together to set the Critical Issues agenda around tomorrow's challenges. These issues then guide the development of our yearly programming - ensuring the content for the Council is driven by its members. Always timely, unique ideas and how to overcome perennial obstacles are shared through peer-to-peer discussions, workshops and an internationally recognized executive coach. The takeaways are driven to enrich and inspire our members by delivering real world success stories, lessons learned and best practices you can immediately apply to your strategy, processes, and operations.



## Industry & Community Relationships

The Council features access to a series of events throughout the year to provide virtual and in-person interaction with executives across industry and related lines of business. Get fresh perspectives on your challenges, collaborate with peers and share insights generated from curated content and Frost & Sullivan research.



## Experiential Learning

Experience excellence in action by touring cutting edge Contact Centers and directly interact with the innovators driving change.



## Advancing the Organization and Growing Your Future Leaders

Award access to Council thought leadership and best practices with peers and rising stars. Identify and support future leaders with content and conversations that will prepare them for the next step in their career.



## Benchmarking Your Company

Identify the areas you are excelling and where you may be falling behind by participating in Frost & Sullivan's three unique proprietary benchmark studies (Contact Center, Marketing and Growth Diagnostic). Upon completion, your team will receive a personalized readout, inclusive of recommendations by an Industry analyst.



MEMBER-VOTED  
CRITICAL ISSUES AGENDA



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# WHAT WE DO - CRITICAL ISSUES AGENDA: 2021

Enabling First-Class Self-Serve

Leveraging Data-Driven Insights

Optimizing the CX Journey

Navigating Workforce Trends  
and Disruptions

Achieving Digital Transformation

Driving Operational Efficiency  
and Effectiveness



## DELIVERABLES & COLLABORATION



# HOW WE DO IT - DELIVERABLES & COLLABORATION

- 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 and 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 webinars, 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.



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## Customer Engagement Leadership Portal

Login to your account below. If you're having trouble logging into your account contact us.

USERNAME OR E-MAIL

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**COUNCIL PORTAL**

Keep me signed in

Login

[Forgot your password?](#)





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# MEMBER PORTAL: "MEMBER CONNECTIONS"

- Year-round access to fellow Council members and new private message feature to help connect in 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

A screenshot of the 'Directory of Council Members' page. It features a grid of 10 member profile cards. Each card includes a profile picture, the member's name, title, and a 'Message' button. The members shown are Nate Brown, Sara Switzer, Meghan Peltzer, Matt Harris, and several others. The page has a blue header and a light blue background.

## Individual Profiles

A screenshot of an individual member profile for Nate Brown. The profile includes a profile picture, name, title (Chief Experience Officer), company (Officium Labs), email address (nbrown@officiumlabs.io), phone number, location (Nashville, TN), and a favorite quote: "Sorry, Goose, but it's time to buzz the tower." - Maverick. It also features a professional summary and expertise areas (Customer Contact Strategy, Customer Experience Strategy, Agent Experience and Engagement, Outsourcing). A 'Message' button is visible in the top right corner of the profile card.

## Private Message

A screenshot of a 'Private Message' button. It features a blue envelope icon and the word 'Message' in white text on a blue background.

## Filters

A screenshot of the 'Filters' section. It contains three dropdown menus: 'Expertise Areas', 'Account Type', and 'Location'. There is a 'More filters' link with a downward arrow on the right side.



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# MEMBER PORTAL: "CONTENT LIBRARY"



MEMBERS ▾ EVENTS & AWARDS CRITICAL ISSUES ABOUT 🔍

Search the content library



Critical Issues



Videos



Diagnostic and Benchmarks



Executive  
MindXchange Events



Virtual Events on Demand



Newsletters



**EVENTS**



# COUNCIL 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.



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## 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 and Human Connection



Customer Service Excellence from a New  
Perspective

Effortless Customer Experience

Effortless Agent Experience



Effortless Customer Experience - European



### Where We're Going

2021: Details Coming Soon



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VIRTUAL  
EVENT

# CUSTOMER CONTACT VIRTUAL

A Frost & Sullivan Executive MindXchange  
February 2-4, 2021



*\*Also scheduled for May 18 – 20, 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.

The screenshot shows a virtual event interface. At the top, there are five video thumbnails of participants: Anita P., Gary B., Owen S., Jen E., and Travis L., each with a 4th place ribbon. Below the thumbnails is a banner that says "Penny is Awesome 1007pts". At the bottom, there are three large orange buttons labeled "1ST", "2ND", and "3RD". To the right of these buttons is a small table showing the score for "Penny is Awesome":

Total Pts	1007
Creatives	155
Trivia	587
Social	265



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VIRTUAL  
EVENT

# CUSTOMER CONTACT VIRTUAL

A Frost & Sullivan Executive MindXchange  
February 2-4, 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



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# UPCOMING EVENTS

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

 Virtual Associate Monthly Member Meeting  
**January 28, 2021 | 1:30–2:00 PM EST**

 Customer Contact VIRTUAL: A Frost & Sullivan Executive MindXchange  
**February 2-4, 2021 | 1:00–4:30 PM EST, daily**  
[frost.com/ccv](https://frost.com/ccv) - see additional details, [here](#) 

 Council Virtual Event: Coaching Clinic  
**February 25, 2021 | 12:00 – 1:00 PM EST**

- 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





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# RECENT EVENTS

## We've Discussed:

	<p><b>Omni Channel Customer</b> Nancy Jamison, Principal Analyst, ICT</p>
	<p><b>VOE &amp; VOC: Separated at Birth – Reunited by a Common Purpose</b> Gerry Brown, Chief Customer Rescue Officer</p>
	<p><b>Mapping Root Cause for Proactive Solutions</b> Aisha Ponds, Director, Stakeholder Escalations</p>
	<p><b>Business Continuity Planning</b> Sonja Stojanovski, Care Center Senior Manager</p>
	<p><b>Customer Sentiment Analysis and VoC</b> Claudia Belardo, Vice President of Business Transformation</p>
	<p><b>Customer Experience Matters Now, More than Ever</b> James Walker, CFE, Senior Vice President</p>
	<p><b>Hiring for Staying Power and Brand Fit!</b> Regan Heckethorn, Vice President of Operations</p>
	<p><b>Conversational AI – Deployment at Scale</b> Ben Bauks, Senior Business Systems Analyst</p>
	<p><b>Balancing Efficiency with the Cost of the Customer Experience</b> Teddi Burress, Customer Experience Strategy</p>



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# FROST & SULLIVAN EXECUTIVE MINDXCHANGES

CLICK ON EACH ICON FOR MORE EVENT DETAILS.

July 12-14



Customer Experience Ecosystem: A Frost & Sullivan Executive MindXchange

September 21



4th Annual Sales Team Accelerator Retreat: A Frost & Sullivan Executive MindXchange

May 18-20



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

November 3-5



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

October 24-27



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



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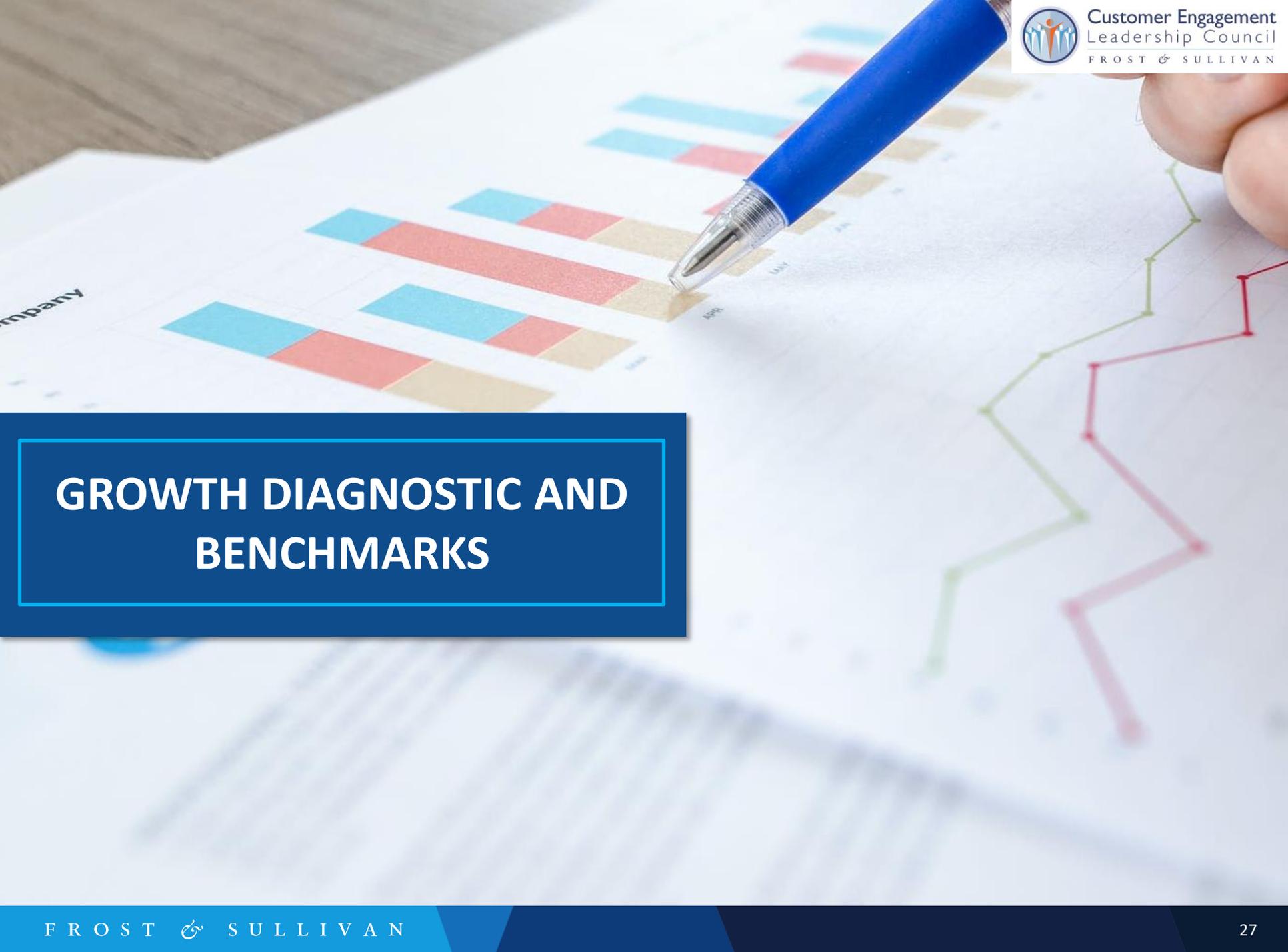
# 16<sup>th</sup> ANNUAL CUSTOMER CONTACT WEST

A Frost & Sullivan Executive MindXchange  
October 24-27, 2021 | Hyatt Huntington Beach, CA



## Annual Council Meeting

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.



**GROWTH DIAGNOSTIC AND  
BENCHMARKS**



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# BENCHMARK SURVEY FOR CONTACT CENTERS



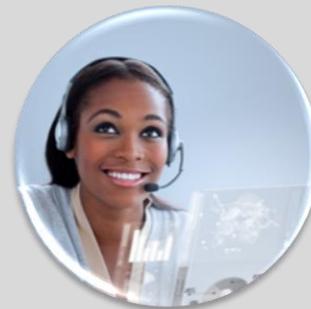
## For WHO

customer experience  
and customer  
service leaders



## 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.



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# BENCHMARK SURVEY FOR **MARKETERS**



## For WHO

B2B Marketing  
Leadership



## WHAT Is It

a survey to help you  
benchmark your  
marketing  
organization,  
strategy and plans



## The WHY

strategic insights as  
to what's hot, what's  
not, where you stack  
and how your peers  
are planning for an  
uncertain year ahead

- What's trending in the digital and non-digital landscape?
- How are marketing departments measured and what's the average return in my industry?
- What % of revenue is falling into the marketing budget for a company my size?
- How many accounts should make up my ABM strategy?
- What are my greatest lead conversion challenges and how do I overcome them?

**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.



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# GROWTH DIAGNOSTIC FOR EXECUTIVES



## For WHO

the C-suite and the  
CEO's growth team



## WHAT Is It

first level diagnosis  
of your relative  
strengths and  
weaknesses  
regarding core  
aspects of your  
growth potential



## The WHY

benchmark on how  
well your company is  
prepared to grow in  
the future

- Ten best practice questions from 50 years of experience
- Perspectives on both Growth and Innovation in relation to your future growth potential
- Benchmark yourself against companies past and present
- Understand which part of the growth pipeline engine your company needs to focus on
- Develop a clear alignment with your colleagues

**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.



## TEAM BENEFITS



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## BENEFITS THAT EXTEND TO YOUR TEAM LEADERS

Designate up to five 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*

### 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.



**INVESTMENT**



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# SOLUTIONS WHEN YOU NEED THEM

COUNCIL MEMBER	EXPLORER
Executive MindXchange Events	Limited Access
Full Portal Access	Limited Access
Full Concierge Service	Self Service
Custom Portal Profile	LinkedIn Profile Only
Transferable & Includes Five Associate Members	Single & Non-Transferable Membership
Quarterly Experiential Networking Activities	Biannual Virtual Networking Activities
Live & Interactive Industry Workshops	On Demand Access to Industry Workshops
Critical Issues Workshop Participation	Critical Issues Workshop Participation
Personalized Benchmark Survey Results	General Benchmark Survey Results
Critical Issues: Voting Rights	RESTRICTED
Virtual Executive Assemblies	RESTRICTED
Coaching Clinics	RESTRICTED
Call Center Tours	RESTRICTED

**Investment: \$9,500**

**\$3,500**



## MEMBER FEEDBACK

“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*

“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*



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Thank You



#### EMAIL

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#### OFFICE LOCATION

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