

Customer Experience Virtual Summit

Creating Loyalty Through an Effortless Experience™

Session Details



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Agenda: May 6, 2020 starts at 10:00 AM EST

10:00 AM - 10:30 AM EST	Welcome Keynote Panel
10:30 AM - 11:15 AM EST	Keynote: Effortless Experience
11:30 AM - 12:15 PM EST	Group 1: Summit Speaker + Breakout Sessions
12:15 PM - 1:00 PM EST	Group 2: Summit Speaker + Breakout Sessions
1:00 PM - 1:45 PM EST	Group 3: Summit Speaker + Breakout Sessions
1:45 PM - 2:30 PM EST	Group 4: Summit Speaker + Breakout Sessions
2:30 PM - 3:15 PM EST	Group 5: Summit Speaker + Breakout Sessions
3:15 PM - 4:00 PM EST	Group 6: Summit Speaker + Breakout Sessions

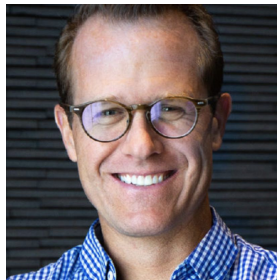
How to Manage Customer Experience in Challenging Times

Times have changed! What helped companies win yesterday will not work today. In this session, customer experience experts talk about top trends in customer experience and share how companies are winning through an effortless experience.



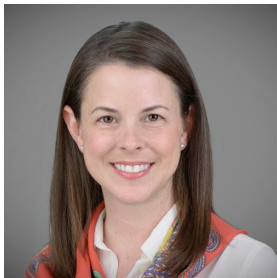
Brad Birnbaum | CEO, Co-Founder & Chairman, Kustomer

Brad is an innovator and a trailblazer in creating disruptive enterprise technologies. He has spent more than 20 years as a C level executive and a serial entrepreneur, building companies and solutions for customer service and support. Mission driven and passionate, he believes in leading with purpose and building solutions that solve real world problems.



Matt Dixon | Chief Product and Research Officer, Tethr

As Chief Product & Research officer, Matt has responsibility for product strategy, product management, research and IP development. Prior to joining Tethr, Matt was Senior Partner and Global Head of Sales Force Effectiveness Solutions at Korn Ferry Hay Group and, before that, was Group Leader of the sales, customer service and customer experience research and advisory practice at CEB, now Gartner.



Lauren Pragoff | VP, Challenger Effortless Experience

Lauren oversees product development, client delivery, and business management for the firm's suite of Effortless Experience services, including the Effortless Experience™ Capabilities Builder (for frontline reps) and the Coaching Capabilities Builder (for supervisors), both of which are designed to upskill customer service staff to meet the demands of the modern customer. Lauren was also a principal contributor to the 2013 book, *The Effortless Experience* (Penguin Books).

KEYNOTE

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10:30 AM - 11:15 AM EST

The Effortless Experience: Conquering the New Battleground for Customer Loyalty

The idea that companies must delight customers by exceeding service expectations is so entrenched that managers rarely even question it. Yet the careful research conducted by Matt Dixon and his team over nearly a decade proves that the "dazzle factor" is wildly overrated—it simply doesn't predict repeat sales, share of wallet, or positive word-of-mouth.

The reality: Loyalty is driven by how well a company delivers on its basic promises and solves day-to-day problems, not on how spectacular its service experience might be. Most customers don't want to be "wowed"; they want an effortless experience. And they are far more likely to punish you for bad service than to reward you for good service.

In this presentation, Matt Dixon provides an overview of the research—including the four key pillars of a low-effort customer experience and how to apply the Customer Effort Score—and shares how he and his research team at Tethr are expanding on the original concepts, leveraging the latest AI and machine learning approaches to study hundreds of millions of customer interactions.



Matt Dixon | Chief Product and Research Officer, Tethr

As Chief Product & Research officer, Matt has responsibility for product strategy, product management, research and IP development. Prior to joining Tethr, Matt was Senior Partner and Global Head of Sales Force Effectiveness Solutions at Korn Ferry Hay Group and, before that, was Group Leader of the sales, customer service and customer experience research and advisory practice at CEB, now Gartner.

SUMMIT SPEAKERS: GROUP 1

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11:30 AM - 12:15 PM EST

Transforming the Customer Experience...From the Inside Out

There's a strong link between employee experience and customer experience. But companies still refuse to make the employee experience a priority, focusing instead on shareholder value, the bottom line, and customer experience (first) without considering the implications of a poor employee experience on all of the above. You've got to focus on the employee experience to improve the customer experience – and business outcomes.

Key takeaways for attendees from this session include:

- A clear understanding of what employee experience is and why it matters
- How employee experience and customer experience are connected
- How to design a great employee experience
- How to assess the employee experience and your leadership



Annette Franz | Founder & CEO, CX Journey Inc.

Annette Franz, CCXP is founder and CEO of CX Journey Inc. She's got more than 25 years of experience helping companies understand their employees and customers and identify what drives retention, satisfaction, engagement, and the overall experience – so that employees, customers, and businesses reap the benefits and achieve their desired outcomes.

Annette was named one of “The 100 Most Influential Tech Women on Twitter” by Business Insider and is an internationally recognized customer experience thought leader. She mentors other professionals in this field to help them advance their careers and is a speaker and an avid writer. In 2019, she published her first book, *Customer Understanding: Three Ways to Put the “Customer” in Customer Experience (and at the Heart of Your Business)*.

The Human Experience Of Your Digital Customers

With customers increasingly moving online, brands that understand the human experience of their digital customers are in a better position to earn repeat business. We'll explore the connection between the physical and the digital as well as tools teams can start using today to better understand their customers.



Ben McCormack | Head of Customer Experience Management, FullStory

Ben McCormack began his career as a self-taught software developer before transitioning to customer support. After managing the support team at FullStory, he's recently shifted to leading Customer Experience Management, helping FullStory to improve the customer journey at every touch point. Ben lives in Atlanta, GA, with his wife and three children. In his spare time, he enjoys getting outdoors, spending time with his family, and getting lost in a good book (or three).

The Most Important Lever Contact Centers Aren't Pulling

Very little of the modern contact center resembles the call center of yesterday. Customers are savvier than ever and expectations are a constant moving target. As a result, companies now hire reps who can be successful in taking control of customer issues. However, companies continue to fill their supervisor ranks by promoting their top-performing reps into leadership roles that they are not prepared to do. Our research shows that coaching is the best driver of frontline rep performance — doing this well will result in higher performance gains relative to best practices in retention, recruiting, and even training. Join this session to learn about the coaching model your supervisors should be practicing—and the risks you face if they do not.



Scott Rothman | Director, Challenger

As a Director with Challenger's Effortless Experience practice, Scott is responsible for sharing and presenting the Effortless Experience™ research and helping companies execute on their low-effort strategies. Scott is a legacy CEB employee, and during his more than ten years there served as a Research Director and Advisor to executive teams around the world on how to more effectively: manage the customer experience, leverage the voice of the customer, develop talent for the new work environment, create an environment of continuous improvement, and manage change.

Climb Out of the Canyon: How to Escape the Insights-to- Performance Gap

Too many organizations are relying on data alone to help them shape and improve the customer experience. The trouble is that data and the dashboards it lives in won't improve performance and behaviors needed to impact CX. This is the Insights-to-Performance Gap which is plaguing nearly every organization that leverages human-to-human conversations as part of their business.



Steve Richard | Co-Founder & Chief Evangelist, ExecVision

Armed with more sales knowledge in his pinky toe than most veteran teams, Steve Richard's passion, mission, and life's work is to help sales professionals become wildly successful. Steve has been featured in The Harvard Business Review, The Washington Business Journal, The Washington Post, CNN/Money and is a guest contributor on CNBC. He has also been named one of the Top 25 Most Influential People in Inside Sales by the American Association of Inside Sales Professionals (AA-ISP). He currently lives in Arlington, Virginia with his wife and four children. Together, the family enjoys jogging, skiing, scuba diving, camping and checking out the museums and dining options in the DC area.

The Violence on the Customer Experience Journey

The experience economy is among the most violent economies in the history of capitalism. Is your company ready to face it? When your value proposition becomes rapidly commoditized and companies all have access to the same brains, capital, and tech, where do you turn?

Companies have begun investing heavily in customer experiences to differentiate themselves, since positive experiences are proven to make price less relevant to customers. The list of familiar companies that have fallen victim to rapidly changing value propositions grows all the time; Toys 'R' Us, Blackberry, Nokia, Blockbuster to name just a few.

And how does CX work towards explaining why this happens? All the big aforementioned brands had high satisfaction and recommendation metrics at the time of their demise. This leads us to the biggest problem in CX today– justifying customer experience initiatives to executive boards by linking CX to profits is difficult. This presentation aims to help you leverage your CX data to improve profits but understanding the most important moment of the experience: the decision to buy or not.



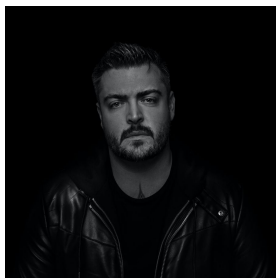
Mary Drumond | CMO, Worthix

Editor in chief of the Voices of CX Blog, host of the Voices of CX Podcast, CMO at Worthix Corp. Currently obsessed with Behavior Economics and Marketing Psychology. Spends way too much time on LinkedIn and Twitter. Listens to far too many podcasts for her own good while walking her dog, Poppy :-)

Rocking Customer Experience

Hear the stories and get the ideas, frameworks, and mindsets to turn up the volume to get your customer experience climbing the charts. You'll learn James' 5 'Rules For Rockstars'

- Find Inspiration
- Create Superfans
- Put things right
- Make things clear
- Let teams rock



James Dodkins | Founder & Customer Experience Rockstar, Rockstar CX

James used to be an actual, real life, legitimate, award-winning rockstar. He played guitar in a heavy metal band, released albums and tore up stages all over the world, James uses this unique experience to energize, empower and inspire his clients and their teams as a 'Customer Experience Rockstar'.

Not only is he an international keynote speaker, #1 Best Selling author and host of Amazon Prime's 'This Week In CX', James is also the UK's #1 Customer Experience Influencer.

SUMMIT SPEAKERS: GROUP 2

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12:15 PM - 1:00 PM EST

The Human Experience Cycle: Unlocking the Power of CX

What is the most important component of customer experience? Human beings. You can't truly improve CX until you understand how experiences actually affect people. During this session with industry visionary Bruce Temkin, you'll learn about the Human Experience Cycle (HxC), which explains how people flow through the experiences in their lives, including as customers, citizens, students, and even as employees. The HxC will provide the foundation for building breakthrough customer experiences.



Bruce Temkin | Head of Qualtrics XM Institute, Qualtrics

Bruce Temkin is an experience management (XM) visionary and is often referred to as the "Godfather of Customer Experience." He leads the Qualtrics XM Institute, which develops thought leadership and training to help organizations around the world master XM. Bruce joined Qualtrics in 2018 after the acquisition of his company, Temkin Group. Temkin Group was a globally recognized leader in research, advisory, and training services that helped many of the world's leading brands build customer loyalty by engaging the hearts and minds of their customers, employees, and partners. He is also the co-founder and Chairman Emeritus of the Customer Experience Professionals Association. Prior to Temkin Group, Bruce spent 12 years with Forrester Research during which time he led the company's B2B, financial services, eBusiness, and customer experience practices, and was the most-read analyst for 13 consecutive quarters.

How Conversations Can Turn Your Cost Center into a Profit Center

Especially today, in this current state of the experience economy, it's critical to invest in your customer success. Dionne explores the translation of sales to customer service and without investing in your customer success team the alternative is you will wither in the dust. This enlightening discussion explores the art of the conversation, how you can deepen the conversation beyond the traditional discovery call and the actionable steps you need to take to accomplish this and thrive even in pandemic times.



Dionne Mischler | CEO & Founder, Inside Sales by Design

A 20+-year Inside Sales veteran and executive, Dionne specializes in establishing and growing inside sales teams at mid-sized companies.

As a Midwesterner living in Southern California, Dionne brings the best of both cultural norms to each conversation and engagement. She provides the perfect blend of Midwest down-to-earth common sense with Southern California sunshine allowing for each client to thrive as they discover their own voice in leading their Inside Sales team or rep in shepherding clients to a positive outcome.

Her clients are global and have seen a 25% uptick in funnel activities and a 30% increase in deal closings.

Remote is the New Normal: How to Continue to Adapt

Now that managing remote teams is the new normal, how can we continue to adapt? This session will explore the tools you need to continue to effectively manage and optimize your newly remote teams while maintaining excellent customer service, and how to keep your agents smiling and sane.

Walk away with answers to questions like:

- How you can make sure your agents aren't just surviving, but thriving.
- How you can provide excellent customer experiences during an influx of requests.
- What top brands have learned including their tips and tricks in how to adapt to a remote working culture.



John Ernsberger | Co-Founder and SVP of Client Services, Stella Connect

John is co-founder and Senior Vice President of Client Services at Stella Connect. He leads the company's efforts on creating a world-class client experience and delivering value through its Client Success, Implementation and Technical Support teams.

John co-founded the business in 2010 and has been a leader on the company's go-to-market teams ever since. He led the sales team for six years before transitioning to the customer side to focus exclusively on helping organizations build and manage exceptional front-line teams.

John received a B.S. in Business Administration from Bucknell University.



Jennifer Duguay | Director of Customer Experience, sweetgreen

Jen is the Director of Customer Experience at sweetgreen. She leads sweetgreen's CX team (inclusive of social community + crisis response) and passionately promotes a culture of customer obsession at sweetgreen.

Jen joined sweetgreen 5 years ago at 20 restaurants with a mission to build + scale a world-class CX team and bridge the gap between farmers, chefs, restaurants & guests. Now at 100+ locations, the driving force of the CX team is to advocate for the voice of the customer & preserve the magic of authentic relationship building with guests.

Prior to sweetgreen, Jen learned her "CX Masters" at Warby Parker in NYC. She received a Dual B.A. in International Affairs and Human Services with a minor in Social Entrepreneurship from Northeastern University.



Joe Gilgoff | VP of Customer Care, Daily Harvest

Joe is VP of Customer Care at Daily Harvest, working with the rest of the leadership team on a mission to help people stock their home with clean, delicious food that's built on real fruits + vegetables and ready to enjoy in minutes. As VP of Care, Joe proudly heads up a world-class team offering a consultative, individualized brand of hospitality to customers across phone; sms; chat; email and social. He also partners closely with leaders in Product; Culinary/Operations; Lifecycle Marketing and elsewhere on the overall Customer Experience and innovation which sets Daily Harvest apart.

Joe is from Queens, NY, is a graduate of McGill University in Montreal, and previously led CX efforts for companies including SeatGeek and 1stdibs.

Becoming a Low-Effort Service Organization: Lessons Learned from Implementing Effortless Experience

Challenger has partnered with dozens of organizations, across a variety of industries, and in both B2B and B2C environments, to implement Effortless Experience™ strategies. Join this panel session to hear directly from your peers as they discuss their best practices and lessons learned from their journeys to reduce customer effort.

Amy Smith | Director, Challenger



Amy is a Director on Challenger's Effortless Experience™ team with over 15 years of experience. In her role, Amy implements several tailored product offerings designed to help companies grow in their journeys to becoming low-effort service organizations. She consults with senior leaders within the Fortune 500 to enable organizational readiness through change management best practices. She partners with the team on product development for the firm's suite of Effortless Experience services, including the Effortless Experience™ Capabilities Builder (for frontline reps) and the Coaching Capabilities Builder (for supervisors), both of which are designed to upskill customer service staff to meet the demands of the modern customer.

Lea Harpster | Vice President, Customer Service, Thomson Reuters



With over 20 years of experience within the legal information technology and services industry, Lea has led large organizations and initiatives across multiple businesses. She has led teams in marketing, sales and account management and customer support. As the Vice President of Customer Support for Thomson Reuters Legal, Lea is responsible for a global, omni-channel contact center with 1.2 million customer contacts each year. Lea's focus is on reducing customer effort, infusing the voice of the customer across the business and using technology to improve the customer experience. Lea is a member of Team Women MN, on the board of the Innocence Project of MN and holds a bachelor's degree from St. Catherine

University. She earned her JD from William Mitchell College of Law.

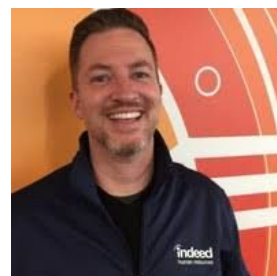
Marian Favors | Director, Customer Support, KARL STORZ Endoscopy-America



Marian is an accomplished senior Service executive and author, who recognizes that success begins with a clear vision, being "other-people" focused, and possessing a balanced EQ and excellent leadership skills. Working across many different types of businesses, she has organized agile teams to strategically grow the business in a customer-centric manner and provide solutions to her customers, which result in delivering customer success. Marian's commitment to the customer's experience resonates from her organization to the entire company. She has been recognized for successful leadership roles, which did not stop at

"good enough." She led the way by aligning technology solutions, business strategy, and engagement philosophies to transform "good enough" operations into sustainable best-in-class winners. Marian has led the efforts for the JD Power certification at her company 8 years in a row and has consistently improved customer satisfaction year-over-year.

Brian Fenerty | Director of Recruiting Operations, Indeed



Brian Fenerty leads the client-facing recruiting function for Indeed Hire that support clients in navigating the talent market in order to attract, engage and hire jobseekers. Prior to his current role, Brian led recruiting in Asia for Indeed as a TA Leader, opened India to the Sales function and supported growth in all functions across the region. Brian has grown and run several recruiting and operations functions for his employers and clients and loves the challenge this provides. Values are at the core of every solution and operation that Brian works with and is the 'killer app' in his team and development strategy. He believes that teams built on values can weather any storm and finds a great alignment in Challenger's Effortless Experience™ that he is implementing with his teams at Indeed now.

Forecast, Schedule, and Manage in a Highly Variable Environment

Whether it's a global pandemic, an unexpected surge in business, or disruptions to service, we, as support leaders, frequently face uncertain environments. In such cases, we are challenged to schedule and manage with a plan.

In this conversation, Nick Lane, a workforce manager with 11 years of experience, and Ryan Wang, co-founder of Assembled and forecasting expert, will discuss the intricacies of forecasting and planning during times of uncertainty.

This discussion will cover topics directly related to the support challenges you face today:

- Anticipating headcount needs or adjustments when contact volumes are extremely variable
- Improving response times and answer rates when there are staffing limitations
- Proving the value of customer support when it's most critical

We'll finish the conversation by discussing the future of support and workforce management, specifically the technologies and practices that support leaders who are looking forward to in 2020 and beyond.



Ryan Wang | Cofounder, Assembled

Ryan is an engineer and cofounder at Assembled. He most recently worked on the Internal Tools team at Stripe, which was responsible for support technology. His background is in statistics and, in a former life as a consultant, he worked on forecasting problems across industries like energy, insurance, and retail.



Nick Lane | WFM Consultant

Nick is a WFM veteran who developed his planning expertise within established, large-scale financial and healthcare organizations. A move to tech then provided opportunities to establish and build WFM programs from the ground up at companies like Google, Fitbit, and most recently, Stripe.

How to Manage Customer Delivery Expectations During COVID19

Delivery is an important part of the customer experience economy and one of the most asked questions by consumers is, "where is my order."

Hear how brands are adapting to the as they change the way they do business, including having to be more proactive in their communications. From order management to shipping, organizations need to be proactive in their communications to customers. The alternative is losing to their competition. Hear how you can leverage AI for agent efficiencies to provide a better experience and how companies are leveraging data to win.



Michael Miller | Chief Product and Strategy Officer, Convey

Michael Miller is a market penetration expert with demonstrated success driving growth and building market share in highly complex and competitive business climates. He has spent two decades in strategic business development roles at leading tech companies large and small, including more than 10 years in multiple positions at Dell. Michael will expand Convey's market reach and scope through strategic partnerships with carriers, consultancies and the broader supply chain ecosystem.



Vikas Bhambri | SVP, Sales & Customer Experience, Kustomer

Vikas leads Kustomer's Sales and CX departments, overseeing Sales, Business Development, Implementation, Customer Success, and Support.

Over the last twenty years, Vikas has worked in a number of different roles and at market leaders like Oracle, LivePerson, and 8x8 in the CRM & Contact Center space in both North America and EMEA. Having worked with companies at all sizes and stages to leverage technology to enhance their people and processes to best acquire, grow, and retain their customers, Vikas builds teams that follow his ethos – that our responsibility is to deliver knowledge and value in every conversation that we have with our customers and partners.

SUMMIT SPEAKERS: GROUP 3

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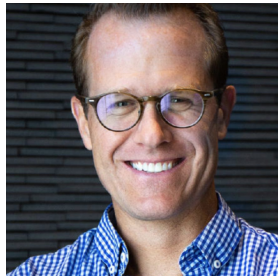
1:00 PM - 1:45 PM EST

The End of Survey-Based CX Measurement?

While measuring Customer Effort is a powerful management idea that can lead to real CX improvements, most companies still rely on post-call surveys as their primary Customer Effort measurement tool. But as survey rates continue to decline, leading companies are using new advanced analytic approaches to effectively listen for Effort—ultimately driving faster, more accurate and more actionable insights into the customer experience.

Join Matt Dixon and Ted McKenna (SVP Product, Tethr) for a discussion on the future of CX measurement and actionable guidance on topics like:

- Why CX leaders should measure Customer Effort
- Why asking customers to rate their Effort level is potentially misleading
- How surveys are becoming ineffective measurement tools
- How CX leaders can go beyond surveys to measure Effort



Matt Dixon | Chief Product and Research Officer, Tethr

As Chief Product & Research officer, Matt has responsibility for product strategy, product management, research and IP development. Prior to joining Tethr, Matt was Senior Partner and Global Head of Sales Force Effectiveness Solutions at Korn Ferry Hay Group and, before that, was Group Leader of the sales, customer service and customer experience research and advisory practice at CEB, now Gartner.



Ted McKenna | SVP Product, Tethr

As SVP Product, Ted works to help Tethr customers take action on identified insights—whether through application of Tethr categories, quantitative models that help make sense of conversation data or playbooks for moving along the Listening Enterprise Maturity Model. Prior to Tethr, Ted led research teams at Russell Reynolds Associates, a leading Executive Search and Leadership Assessment company, with particular focus on: growth enablement, leadership advisory and board governance. Prior to that, he held research, advisory and product leadership roles of increasing seniority at CEB (now Gartner), with particular focus in CEB's Sales and Marketing Practice.

How to Scale Without Sacrificing Support

Find out how some of the biggest online companies have grown, without compromising customer service. We will dig deep into learnings from the Simplr CXLife report on Scaling CX: How to Scale Customer Support without Sacrificing Customer Experience.



Daniel Rodriguez | CMO, Simplr

Daniel Rodriguez is the CMO at Simplr and has extensive marketing and entrepreneurial experience, having served as the VP of Marketing for Seismic and Head of Marketing at Alyce. Daniel is a graduate of Harvard College and has an MBA from MIT Sloan. Daniel enjoys spending all of his time with his 3 young children and wife during the coronavirus pandemic.

The Evolution of CX: What Every Company Must do to Win in the New Normal Economy

The role of Customer Experience is still emerging and organizations struggle to define their CX strategy in an effort to gain customer loyalty. Oftentimes it falls apart because CX is so far removed from any digital transformation effort; it was destined to fail. It's in this session, Nate talks about the role of the CX leader including some of the challenges they face. But the importance and criticality of their responsibilities, the least of which is defining the strategy on how to deliver great experiences, often leaves companies trying to figure out where to start. With Nate's years of experience, he shares details on his formula of CX Accelerator that you can leverage today. CX Accelerator provides answers to questions like:

- How can you motivate your employees to serve customers better
- How to understand your customers more
- Understand that only then is it the right time to define your strategy
- Get the change management techniques you need



Nate Brown | Chief Experience Officer, Officium Labs and Co-Founder of CX Accelerator

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 2015. He was dubbed the "CX Influencer of the Year" by CloudCherry in 2019, as well as being named a top CX thought leader by TruRating, Qminder, ProcedureFlow, LifeHelpNow, ICMI, 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.

When and Why You Should Consider Outsourcing Your Customer Service Team

Discover what separates modern new age outsourced call centers from legacy BPOs. Cloud Task gets honest about their differences and what to look for, including:

- A culture that matches your own
- To be extensions of your team
- That have experiences you don't have in house



Amir Reiter | CEO, CloudTask

Amir Reiter is the CEO of CloudTask, a managed workforce provider for companies looking to increase their sales, customer retention and revenue, through trained and managed teams of outsourced sales, customer support and customer success experts.



Tom Jenkins | VP of Marketing, Consultant

Tom Jenkins is an experienced marketer who leads a team of 7 at CloudTask. He's worked across sales, marketing and project management and uses his experience from all different roles to set and deliver a clear story and message to clients, partners and prospects.

The Next Frontier of CX and What it Means to Contact Centers

The largest work from home experiment was launched and it came at the hands of a pandemic. This session discusses insights on what can we expect next from customer experience technology in the contact center space. We'll review the phases of the transition to working from home from leveraging AI to rethinking the agent experience and the tools they need to drive experiences for your customers. More importantly, what's next, how to:

- Migrate to a hybrid model with a blend of wfh and brick and mortar
- Continue to train the consumer on digital channels. what about the next channels like video
- Integrate employee performance management on a wholistic scale with the new data points



Fred Stacey | General Manager, Cloud Call Center Search

Fred Stacey is the General Manager and Co-Founder of Cloud Call Center Search which is a division of Outsource Consultants. Fred has been in the contact center industry for over 25 years, starting out manning the phones as an agent before moving to the operations side where he worked to recover failing call centers and start new ones. During that time he worked in leadership roles, involved in technology acquisitions and center build outs while overseeing the ongoing center operations and selecting future leadership.

Prior to joining Corey Kotlarz to start Cloud Call Center Search, Fred held executive level roles in contact center and debt collections software companies. He has managed every aspect of a software company, from running Europe, Middle East and Asia Pacific operations to co-founding startups where he served as COO. Fred specializes in contact center and debt collections software, selection, business operations and strategy.

As General Manager of Cloud Call Center Search he assists companies in identifying the right technologies for their contact center needs, and is constantly evaluating products from artificial intelligence to workforce optimization – and everything in between.

Managing Customer and Employee Engagement to Drive Loyalty

Is there a correlation between employee feedback and customer feedback? Perhaps there should be. It seems so logical, but many organizations don't connect the two. Hear practical use cases and how brands like Apple, Chewy and Marriott, are intentionally creating experiences that give customers the emotional attachment they seek. Vipula dives into the potential of driving emotional outcomes through rational data. She also raises the question of how companies will endure post Covid-19, with lower cost structures and new value propositions. Join for some actionable steps on how CX leaders can do better in driving differentiated customer value.



Vipula Ghandi | Managing Partner, Gallup

Vipula is passionate about the human side of an organization. This passion, backed by Gallup's research on employee engagement, organizational culture, performance management, talent-based hiring and strengths-based development, gives her insights into clients' business needs and helps them successfully initiate change.

She is motivated to make a positive difference in organizations by ensuring that individuals realize their full potential, thereby helping their organizations reach their goals and achieve their vision.

SUMMIT SPEAKERS: GROUP 4

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1:45 PM - 2:30 PM EST

Become an Unforgettable Company

The best companies are rooted in trust. In belief. In their humanity. And in a deliberate commitment to earn growth by aligning their values with how they do business. This is how they become unforgettable. It's how they don't get left behind, no matter the competition or market conditions.

However, truly engaged leadership necessary to achieve this state is missing in over ninety percent of transformations. In our time together, we will discuss the behaviors of brave leaders that elevate a company and its people, actions to engage and unite these actions, and how to assess your ability to achieve this status in your organization.



Jeanne Bliss | President, Customer Bliss

Jeanne Bliss helps companies and people become the best version of themselves. She guides them to define, build and live the behaviors and actions that will fuse customers to them, and ultimately create deep and memorable relationships. Creating these deeper bonds has been Jeanne's singular mission for over 35 years. First, as the inaugural Chief Customer Officer at Lands' End, Coldwell Banker, Allstate and Microsoft Corporations. Then since 2002, guiding over 20,000 leaders around the world to understand that improving lives should be their most important strategic vision. She has shepherded a whole new breed of leader into the marketplace prepared to lead this change through her pioneering years as a practitioner, experience coaching global leaders, her four game-changing books, and as cofounder of the Customer Experience Professionals association.

The Power of Tiered Customer Service

The concept of applying tiers to your customer service isn't a brand new idea, but how do you know if it's for you? We caught up with AI, an expert in this space for 12+ years to explain how it works and what you should be thinking about it.

If you want to be a disruptor in your market and you have the right business model, adopting and organizing your support calls in a tiered approach where your most important customers are prioritized to the right person/people in record time.



AI Hopper | Customer Service Thought Leader, Nagurra

AI is a Customer Service and Experience leader who enjoys building teams seeking new ways to connect customers and the companies that serve them.

A Punk's View on the 11 Things Stand Out CX Performers Do Well and What You Should Do About Them

The fight to achieve a market-leading customer experience is increasingly feeling like a maelstrom and firms are struggling to keep up. Competition, disruption, artificial intelligence, automation, big data, omni-channel, personalisation, behavioural science, privacy, ROI challenges these are only some of the issues that firms are wrestling with. In a punchy and colourful way, Adrian will explore some of challenges businesses face, what they can do to surmount them, how they should approach these challenges as they look to grow and what they should be focusing on to help them develop and deliver the market leading customer experience that they desire.



Adrian Swinscoe | Best-selling author, Forbes contributor, speaker, advisor and aspirant CX Punk

Adrian Swinscoe is a best-selling author, Forbes contributor, speaker, advisor and aspirant CX Punk. He has been growing and helping develop customer-focused large and small businesses for over 25 years now. His clients have included the UK Government's Crown Commercial Service, Sky, NowTV, ITV, Apple, KFC, Pega, Philips, Cancer Research UK, Talk Talk, Gazprom, CIMA, IHG, Olympus, Harper Collins, Médecins Sans Frontières, Microsoft, Pearson, Consumers International and Costa Coffee amongst others. Adrian is a frequent

writer, podcaster and speaker on all things related to customer experience.

He published a best selling book in 2016 called *How to Wow: 68 Effortless Ways to Make Every Customer Experience Amazing* (Pearson) and recently published an exciting new book: *Punk CX*.

You can find out more about Adrian via:

- Blog: <http://www.adrianswinscoe.com>
- Forbes column: <http://www.forbes.com/sites/adrianswinscoe/>
- LinkedIn profile: <http://uk.linkedin.com/in/adrianswinscoe> and
- Twitter: <http://twitter.com/adrianswinscoe>
- Instagram: https://www.instagram.com/punk_cx/

See Clearly! Visual Collaboration in Your CX

Communication is changing; and it's time for your CX strategy to adapt! Using technology already in the hands of your agents, technicians and end-users, leverage visual context and augmented reality to empower your organization to deliver brand-elevating customer interactions and unlock hidden value in your business.



Wade Radcliffe | Head of Partnerships, Stream

Wade Radcliffe has been bringing leading-edge technology to contact centers large and small for over 20 years. He's worn hats in Product, Business Development, Engineering and Operations but has remained acutely focused on bringing out the maximum value for clients and their CX.

How to Create a Customer Experience Vision

A customer experience vision is a shared definition of an outstanding experience that gets everyone on the same page. It is the cornerstone of a customer-focused culture. Fortunately, it doesn't have to take months of endless focus groups, surveys, and brainstorming sessions to write one. Discover a proven method to write a clear, and compelling customer experience vision in just two hours!



Jeff Toister | President, Toister Performance Solutions

Jeff helps get employees obsessed with customer service.

He is a best selling author who has written three customer service books, including *The Service Culture Handbook: A Step-by-Step Guide to Getting Your Employees Obsessed with Customer Service*. Thousands of customer service professionals from around the world subscribe to Jeff's Customer Service Tip of the Week email.

Jeff has been recognized as a top influencer by many organizations:

- Top 30 customer service professional in the world (Global Gurus)
- Top customer experience influencer (Unymira and Panviva)
- Top contact center influencer (ICMI and ProcedureFlow)

More than 140,000 people on six continents have taken his video-based training courses on LinkedIn Learning. Jeff's training videos include Customer Service Foundations and Leading Customer-Centric Culture.

The Most Important CS Skills to Build During Uncertain Times

Your customers are stressed. Your team is stressed. The future is uncertain and the changes feel overwhelmingly difficult to deal with. It is during these challenging times that it is essential to lean into the human side of Customer Success. Never has it been more important to develop three critical skills to help us be more compassionate and build stronger relationships, including:

- Listening well
- Asking the right questions
- Knowing how and what to act



Anne Raimondi | Chief Customer Officer, Guru

Anne Raimondi is an industry veteran with over 20 years of experience driving growth for B2B and B2C companies, including some of the world's foremost leading SaaS firms, taking them from startup to nationally recognized brands. Currently, she is the Chief Customer Officer for Guru. Prior to Guru, she served as the SVP of Operations for Zendesk, driving employee growth from 350 to over 2,000 across 20 global offices, while operationalizing their strategy to expand into multiple product lines and grow up-market to better serve enterprise customers. Prior to Zendesk, Anne served as a product leader and executive for technology innovators including Survey Monkey, TaskRabbit, Blue Nile and eBay.

Anne is also a Lecturer in Management at Stanford Graduate School of Business, a mother of 3, and active angel investor. She holds a B.A. in Economics and Sociology and an M.B.A. from Stanford University.

SUMMIT SPEAKERS: GROUP 5

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2:30 PM - 3:15 PM EST

The Convenience Revolution

When it comes to customer service, your customers are smarter than ever before. They no longer compare you to a direct competitor; they compare you to the best service they have ever received from anyone. To stay ahead of the curve, you must provide an amazing experience, one that is simple, easy and friction-free. A convenient experience could be what differentiates you from your competition. When all else is equal (your products and service), the company that offers an easier—as in more convenient—experience will win. Shep Hyken, customer service and experience expert, award-winning speaker and New York Times and Wall Street Journal bestselling author, will reveal the six “Convenience Principles” that will give you a competitive edge. It’s time to join the revolution—the Convenience Revolution!



Shep Hyken | Chief Amazement Officer, Shepard Presentations

Shep Hyken is a customer service and experience expert and the Chief Amazement Officer of Shepard Presentations. He is a New York Times and Wall Street Journal bestselling author and has been inducted into the National Speakers Association Hall of Fame for lifetime achievement in the speaking profession. Shep works with companies and organizations who want to build loyal relationships with their customers and employees. His articles have been read in hundreds of publications, and he is the author of Moments of Magic®, The Loyal Customer, The Cult of the Customer, The Amazement Revolution, Amaze Every Customer Every Time, and The Convenience Revolution. He is also the creator of The Customer Focus™, a customer service training program which helps clients develop a customer service culture and loyalty mindset. (Now available as an online/web-based training program!)

Satisfying the “Divinely Discontented Customer”

Consumers’ expectations for service now exceed any brand’s ability to deliver it. Brands have to deliver expert problem-solving in record-setting time. So, how do the best brands manage to pull this off without breaking their staff or the bank? Ted Mico, CEO of Thankful, provides best practices, tips and techniques for meeting your customers’ evolving and increasing demands.



Ted Mico | CEO and Founder, Thankful

Ted Mico is the co-founder/CEO of Thankful, the leading AI customer service platform for ecommerce brands. Ted has been at the forefront of digital disruption for over 25 years, including roles as COO of computer vision innovator Mirriad and EVP at Interscope where he was part of a four-man team that launched Beats By Dre.

CSAT Improvement vs. Cost Optimization: How to Achieve Both

Now more than ever, organizations are understanding the importance of customer satisfaction. However, choosing to invest in CSAT is traditionally done at the expense of cost optimization, which can be difficult when cost reduction is also a priority. At Ada, we believe you can achieve both. Join us to learn how automation can help you achieve both happy customers and happy executives.



Ruth Zive | Head of Marketing, Ada

Ruth is a skilled and metrics-driven marketing strategist who believes in evidence-based revenue growth through the coordination and alignment of marketing and sales processes. Ruth has worked for two decades serving B2B clients in the technology, financial services and non profit industries. Currently, Ruth is Head of Marketing at Ada, where she oversees Growth, Product Marketing and Business Development. Ada is the leader in Automated Customer Experience, and enterprise customers across the globe use Ada's software platform.

How to Build Up and Manage Your Digital Customer Service Team

As volumes of digital conversations increase, more and more organizations have embraced social media, live chat and messaging apps to provide customer support. In order to master conversations over digital channels, even the most experienced agents and managers need to be equipped with a new skill-set. That's the essential fuel to leverage digital conversations and consolidate trust.



Paolo Fabrizio | Digital Customer Service Consultant, Trainer, Author, Speaker

In the 90s he took part in the startup of the first online insurance company in Italy, following the customer's entire lifecycle.

Since 2013 as a consultant and trainer he has been helping companies to harness digital customer service as a business driver.

Founder of CustomerServiceCulture.com, author of books and speaker at conferences in Italy and abroad.

Lecturer at Bicocca University of Milan.

Three Things your Customer Success Team Must Do to Turn Customers into Raving FANS

Customer Success is about so much more than "satisfied" clients or managing the "implementation". Building a Customer Success Organization from the ground up OR maturing an existing one requires that you drive strategies around three strategic focus areas:

1. Ensure ROI
2. Drive Adoption
3. UpSell

Tune in to this "Water Cooler Chat" with Vengreso Founder and CEO Mario Martinez Jr., Head of Customer Operations and Experience Ivonne Ribeiro, and Customer Success Manager Wendy Gertridge. We'll be discussing why every CS leader must change their mindset and make the shift using these three points. In addition, we will share how we took everything we knew and built a best-in-class Vengreso's Customer Success organization and how YOU can replicate our success!



Mario Martinez Jr. | CEO and Founder, Vengreso

Mario is the CEO and Founder of Vengreso. He spent 84 consecutive quarters in B2B Sales and Leadership roles growing hundreds of millions of dollars in revenue annually. Mario is one of 20 sales influencers invited to appear in the Salesforce documentary film "The Story of Sales" launched in 2018. He was named 2019's Top 10 Sales Influencers by The Modern Sales Magazine, 2018's Top 25 Most Influential Inside Sales Professional, Selling Power Magazine's 2018 Top Sales Training and Coaching Consultant, and was recognized in 2019 as one of the top Social Media Leaders by The Social Shake Up. As a renowned digital sales evangelist, Mario teaches marketing and sales professionals how to develop an engaging personal brand to attract today's modern buyer using the digital sales ecosystem. Mario is the host of the

popular Modern Selling Podcast. He's been featured in Forbes, INC., Entrepreneur and was formerly a contributor to the Huffington Post. He's a highly sought-after Keynote Speaker with brands such as LinkedIn, Cisco and many more. He is also known to open a speech with a Salsa dance.



Ivonne Ribeiro | Head of Customer Operations and Experience, Vengreso

Ivonne is our Head of Customer Experience Operations. She manages and improves all aspects of Vengreso's work-flow implementation processes and Vengreso's On Demand Learning Management System. By doing so, she ensures our Customer Success Managers are equipped to help our clients succeed. Her 20+ years' experience within corporate and entrepreneurial organizations has rewarded her with valuable skills in operations management, client services management, marketing, and sales. This has provided Ivonne a unique perspective. Her desire is to ensure each client's experience is consistent, seamless, and exceptional.

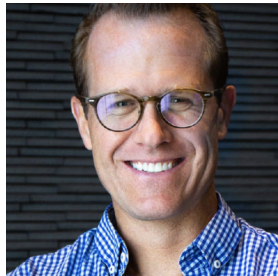


Wendy Gertridge | Customer Success Manager, Vengreso

As a Customer Success Manager, Wendy supports clients in navigating our programs from start to finish, ensuring that they reap the greatest results possible. In addition, she uses her 15+ years of experience as a writer and editor in the publishing and marketing industries to help manage our talented writing team. Wendy holds a BA in Communications and in her precious spare time, enjoys life on the New Hampshire Seacoast with her husband and their senior black lab, Moose.

Reducing Effort in Times of Panic

Tethr analyzed one million calls across 20 companies to see how the COVID-19 pandemic is affecting different areas of the enterprise. What we learned is troubling and spells bad news for CX and customer service teams alike. However, we've also identified three best practices that can help CX and service leaders support frontline reps and customers, help reduce effort and mitigate disloyalty in this volatile environment. Join Tethr's Matt Dixon and Ted McKenna for a discussion on our findings and recommendations for navigating customer interactions during these volatile times.



Matt Dixon | Chief Product and Research Officer, Tethr

As Chief Product & Research officer, Matt has responsibility for product strategy, product management, research and IP development. Prior to joining Tethr, Matt was Senior Partner and Global Head of Sales Force Effectiveness Solutions at Korn Ferry Hay Group and, before that, was Group Leader of the sales, customer service and customer experience research and advisory practice at CEB, now Gartner.



Ted McKenna | SVP Product, Tethr

As SVP Product, Ted works to help Tethr customers take action on identified insights—whether through application of Tethr categories, quantitative models that help make sense of conversation data or playbooks for moving along the Listening Enterprise Maturity Model. Prior to Tethr, Ted led research teams at Russell Reynolds Associates, a leading Executive Search and Leadership Assessment company, with particular focus on: growth enablement, leadership advisory and board governance. Prior to that, he held research, advisory and product leadership roles of increasing seniority at CEB (now Gartner), with particular focus in CEB's Sales and Marketing Practice.

SUMMIT SPEAKERS: GROUP 6

[REGISTER HERE](#)

3:15 PM - 4:00 PM EST

Simple Changes to Create the Future of Contact Centers

The contact center is often the low point of a customer's experience with a brand. But if they're calling, then the stakes are high. With the right approach, you can turn their pain into an opportunity for a lasting positive experience and improved loyalty. In this session, join Luke Williams, CX thought leader and NY Times bestselling author, on how to foster simple innovations that meet your customers' needs and delight them in the process.



Luke Williams | SVP @The XM Institute, Qualtrics

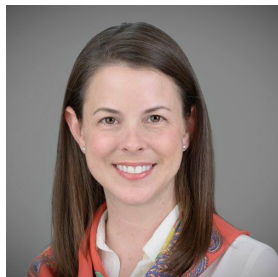
Luke Williams is SVP @ the XM Institute at Qualtrics. He is an award-winning researcher and author of a New York Times and USA Today bestseller ("The Wallet Allocation Rule"), as well as a Bookscan bestseller ("Why Loyalty Matters"). A statistician and methodologist by training, Luke is a thought leader in the space of customer experience, client satisfaction, client loyalty, client ROI, customer strategy, and analytics. His work has appeared in dozens of academic and trade publications, including the Harvard Business Review, MIT Sloan, The Wall Street Journal and co-authorship of a Harvard Business School Case Study, among others.

Prior to Qualtrics, Luke was Corporate Vice President of the Client Care Program at AECOM, where he was responsible for the global client feedback measurement, analytics and insights team. Luke previously held multiple roles at Ipsos Loyalty, including Head of Research Methods & Head of Consulting, and Vice President, Financial Services.

Luke is a member of the Market Research Association (MRA) and CXPA. He holds an M.A. in Research Methods from Durham University in England.

Small Words, Big Impact

Customer baggage includes past experiences, perceptions, and relationships with companies that customers carry into service interactions. In many organizations, customer service representatives are trained to ignore customer baggage, and instead focus on resolving the immediate issue they contacted the company about. What those organizations do not realize is that customer effort can be reduced up to 72% by acknowledging baggage in live service interactions.



Lauren Pragoff | VP, Challenger Effortless Experience

Lauren oversees product development, client delivery, and business management for the firm's suite of Effortless Experience services, including the Effortless Experience™ Capabilities Builder (for frontline reps) and the Coaching Capabilities Builder (for supervisors), both of which are designed to upskill customer service staff to meet the demands of the modern customer. Lauren was also a principal contributor to the 2013 book, *The Effortless Experience* (Penguin Books).

I Never Planned for This: 6 Lessons for Leading Through the Chaos

One of the greatest tests for any leader is to put them in a situation that they never expected and to watch what they do next. For many of us, that unexpected situation is now, and the question on our mind is, "what's next?" In this session, Justin Robbins will share six lessons that he's learned in leading and learning from the unexpected. He'll provide practical advice that will equip you to learn from your current circumstances and lead your team through to the other side of it all.



Justin Robbins | Communication Evangelist, JM Robbins Associates

Justin is a business communications expert, professional speaker, and consultant who enables organizations to drive sustainable customer experience improvement. Over the course of his career, he's coached and mentored thousands of individuals around the globe on contact center and customer experience best practices.

At 8x8, his focus is creating clear, impactful content, workshops, and programs for contact center, customer experience, and communications professionals. He's authored numerous pieces of research, widely distributed articles, and is a featured expert for mainstream media outlets including the New York Times, NBC Nightly News with Lester Holt, and iHeartMedia.

Communication, Convenience & Compassion: Keys to Success in a Post-COVID World

As the impact of the coronavirus (COVID-19) ripples through the economy, maintaining consumer confidence will be key to long term success. As shortages flow into the last mile of the supply chain and eCommerce volume spikes, it's paramount for brands to meet heightened customer expectations. Retailers who will succeed will be those who invest in providing customers convenient order options and who commit to communicating openly with consumers at all stages of the journey.

Join the session to learn:

- The importance of delivery dates on a shopper's propensity-to-buy
- How consumer delivery preferences have changed
- Expectations for post-purchase communication



Kirsten Newbold-Knipp | Chief Growth Officer, Convey

Kirsten has more than 15 years of senior marketing leadership experience at Fortune 100 companies and high-growth startups, including HubSpot, SolarWinds and BigCommerce. Most recently she was research vice president at Gartner, where she advised CMOs on refining strategy, organization and martech priorities. Kirsten oversees Convey's corporate brand and messaging initiatives while scaling marketing support for repeatable pipeline and revenue growth.

Connection in Crisis: Keeping Customers Close in Distant Times

A Fireside Chat with Aircall's Head of Customer Care

The customer experience you provide is critical to your customer's success, as well as the long-term vitality of your organization. During times of uncertainty, and crisis and isolation, customer care teams are faced with unique and unprecedented challenges externally, while also dealing with the toll of internal stress, burnout, and exhaustion.

Get an inside look at Aircall's customer care team and how we're navigating the crisis day by day. How do we provide empathetic and human-based support to our customers while maintaining the health, stress level and workload of our team?

Grab a drink, put on a face mask, and join Ian MacLean, Aircall's Head of Customer Care, for a cozy fireside chat where we'll discuss the critical issues customer experience leaders and their teams are facing today.



Ian MacLean | Head of Customer Care NA, Aircall

Ian is Aircall's Head of Customer Care NA, bringing over 15 years of experience in technical support and customer service from companies like Datto, Zebra Technologies and Motorola. He oversees Aircall's team of customer support, porting and onboarding specialists in New York City.

In his free time, Ian loves to run and hike, but has since replaced that hobby with a new kind of love: chasing his two-year-old son around! He lives his life through music, all types, which is something he hopes to pass down to his son, Jake.