

SPECIAL REPORT:

# INTELLIGENT CUSTOMER CONTACT WORKFORCE

**AUTHOR: BRIAN CANTOR** 



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### **SPECIAL REPORT CONTRIBUTORS:**



Anand Janefalker
Founder & CEO
UJET



Jeanne Bliss Founder & CEO Customer Bliss



**Shonda Bowman-Pero**Director, Global Training and Quality
Match



Michael Brandt
Group Vice President - Process Excellence Manager Customer Care
ABB



# SPECIAL REPORT: INTELLIGENT CUSTOMER CONTACT WORKFORCE



Are your customer contact agents intelligent?

That question is not an inquiry into the average IQ of your contact center team. It is not even an assessment of whether agents possess comprehensive knowledge of your products and processes.

It is an inquiry into whether they have the information and capability needed to provide customers with the quick, frictionless, personalized experiences – where and when they are demanding them.

True agent intelligence – the kind that drives optimal performance – hinges on access, versatility and empowerment. Do agents have access to the specific, contextual information they need to resolve customer problems? Can agents adapt to customers whose personalities or requests deviate from the typical protocol? Are agents able to deliver the best possible answers, ideas and resolutions without subjecting customers to undue delays, transfers and red tape?

This report will ensure you can answer those questions in the affirmative.

It will not downplay the importance of hiring smart agents and supplying them with detailed training about the company's products, customers and policies.

It will, however, empower your customer service team to be more efficient, increase agent satisfaction, and delight customers.



# INTELLIGENCE: HOW TO CONNECT WITH CUSTOMERS, DEFEAT COMPETITORS



In the words of UJET's Anand Janefalkar, agent intelligence is a measure of the cognitive distance between agents and customers. The smaller the distance, the greater the intelligence.

Why is it so important to minimize that distance?

To answer that question, it is important to consider some important phenomena within the customer contact landscape.

#### **Competing on the customer experience**

Fifty-two percent of customers will consider switching to a competitor after bad experiences even if the competitor charges more or offers an inferior product.

This staggering statistic speaks to the reality of competing on the customer experience. In the age of Amazon and Zappos, businesses are not winning based on product quality or price alone. They demonstrate their clearest value — and establish their clearest competitive advantage — based on the overall experience surrounding their products.

Agents play a pivotal role in the success or failure of that experience. "Intelligent" agents who can quickly identify customers, understand their issues and provide compelling engagement give organizations the edge over their competition.

### Demand for fast, frictionless, personalized experiences

Customers and businesses do not simply agree about the importance of the experience. They agree on the blueprint for a great customer experience.

All agree that the ideal experience is fast, easy, resolute and tailored to the individual customer.



Speed is a pivotal priority for over 80% of businesses, and first contact resolution is a key success metric. Businesses call "reducing effort" their #1 priority for 2018 and "personalization" the defining sign of a customer-centric experience.

More than 70% of customers identify fast resolutions on the first contact as their top engagement priority. The most common complaint from customers involves needing to repeat themselves as they move between touch points, confirming their aversion to difficult, impersonal interactions.

Consumer insights, enabled by technology, play a direct role in meeting this demand. Given real-time access to actionable, contextual information regardless of channel, intelligent agents can eliminate the hassles long associated with customer service interactions. Instead of subjecting customers to the burden of reintroducing themselves and their issues, these intelligent agents can *quickly* provide tailored, valuable assistance.

Intelligent agents can "anticipate the customer's need and avoid asking repetitive questions," notes Janefalkar. They can reduce average handle time and effort, while simultaneously increasing first contact resolution, customer satisfaction and operational efficiency.

### Impact of technology

When it comes to customer engagement, machines are not replacing the human touch.

As engagement increasingly shifts to digital channels like live chat, SMS and social media, agents will need to deliver personalized experiences across a greater number of touch points. They will also need to access data from each of these channels in future interactions.

Technology is not, however, merely creating new venues within which agents will converse with or learn about customers. It is also changing the types of conversations they will have.







It's important that as we move into this space where there are so many options for customers, that you sound human no matter what the channel and that you have the right people, no matter what the channel," declares Jeanne Bliss.

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Buoyed by artificial intelligence, self-service platforms are becoming increasingly capable of resolving simple, transactional matters. As a consequence, customers will not as frequently seek agent assistance for these issues.

They will, however, turn to agents for support with complex, nuanced, unpredictable issues. Agents must have the capability — as defined by their training, tools and corporate trust — to handle these deeper conversations.



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Al in call centers is not a replacement play," declares Janefalkar. "Combined with machine learning, Al assists contact centers in finding the most efficient path for answering questions, estimating wait times, or moving to an alternate channel for resolution. Organizations need to find the balance between Al and human agents, understanding the roles for both and how everything works together within the customer support equation.





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When [customers] opt into reaching the humans in your company, it's never been more important that they're the right people, that they're prepared, and that they're enabled to make decisions," explains Bliss.

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### **Agent experience**

Given the customer contact community's widespread confidence that "happy agents yield happy customers," it should come as no surprise that the agent experience ranks as a top customer contact priority.

Some may, however, be surprised to learn which factors actually drive the agent experience. While industry speakers and authors tend to focus on bright workspaces, pizza parties, company retreats and incentive programs, CCW Digital research confirms day-to-day empowerment as a far bigger factor. Agents value intuitive knowledge bases, helpful CRM tools, unified desktops, omnichannel engagement tools and automated learning systems.





Our customers tell us soft elements add fun to the workplace, but they can't take the place of intuitive, smart tools and modern systems that enable agents to personalize service," reveals Janefalkar. "Having the right tools is critical to reducing attrition and increasing job satisfaction.

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Indeed, organizations that prioritize agent intelligence deliver greater job satisfaction. Consequently, these organizations retain their best agents and avoid the costs of repeated recruiting, onboarding and training.



### THREATS TO AGENT INTELLIGENCE

Agents may have incredible potential, but do they have the tools to realize that potential?

For many organizations, the answer is a resounding "no." Due to issues with their technologies, processes, and training, these organizations fundamentally inhibit agents' ability to meaningfully engage with customers. As a consequence, these organizations bottleneck agent intelligence in an era where the stakes of that intelligence are exceedingly high.

Agent intelligence is a measure of real-world capability rather than theoretical capacity. Several common challenges diminish that capability.

### **Disconnected and dated systems**

Disconnected systems are the greatest source of agent frustrations. Sixty percent of businesses, in fact, say their employees *frequently* complain about disjointed contact center technology.

Organizations also identify disconnected systems as the #1 agent experience issue, #1 performance bottleneck and #1 technology challenge.

Those statistics, of course, only serve to validate common sense: technological silos are a problem for today's contact centers.

More specifically, they diminish agent intelligence.

If agents need to jump through multiple hoops in order to properly serve customers, they have no chance of delivering an optimal experience. They will not be able to serve customers without asking them to repeat information. They will not be able to tailor the conversation to the individual customer. They will not be able to provide a resolution as quickly as possible. They will not be able to make impromptu, unscripted decisions based on the specific context.



The issue goes beyond integration. It is not enough for the systems to "talk to each other" — they must also share relevant, actionable insight when and where the agents need it.



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When agents don't have visibility into a customer's full account data, it's like asking them to do a job blindfolded and with one arm tied behind their backs," remarks Janefalkar.

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#### **Channel silos**

The fragmentation challenge rears a particularly ugly head when it comes to omnichannel engagement.

Today's customers expect to move seamlessly between all contact channels, but many organizations do not empower customers or agents to accommodate this demand.

Specifically, they keep different channels in systemic silos. Employees must access different screens and tools for each channel, which creates delays for customers and frustration for agents. The need for training in each system further hurts productivity — and further drives agent frustration.

This debilitating challenge is, unfortunately, the rule rather than the exception in today's customer contact space. Fifty-two percent of businesses say their customers can never move between channels without delays. Only 20% believe their systems are unified enough to allow for a *consistently* seamless experience.

### Ineffective performance management

There is one surefire way to ensure agents do not perform properly: provide mixed, unclear or nonexistent messages about their performance.

Sadly, many organizations make this mistake. Despite preaching a commitment to customer centricity and urging agents to go above and beyond for their customers, organizations will strictly evaluate agents against efficiency metrics like call count and average handle time. They may, moreover, discourage agents from veering off script to successfully resolve customer problems.

Making matters worse, many do not provide agents with access to real-time scoring. Without clear insight into how they are performing or how their actions are affecting customer satisfaction, these agents have no way to self-diagnose problems or make improvements.





Organizations tend to wait until the last minute to give agents the information they need," revealed Shonda Bowman-Pero of Match Group during the recent CCW Online summit. "It doesn't give them the opportunity to ask questions and understand why they're doing what they're doing.

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Lacking a clear sense of their goals or their contribution to those goals, these agents cannot perform properly. They will also feel disengaged and frustrated with the environment, in turn creating an additional problem for the organization.

### **Misguided training**

The best agents do not read from scripts. They use context and empathy to connect with customers in a meaningful way.

Sadly, many contact center training programs are geared toward the former. Trainers educate agents on basic processes, product capabilities and contact center systems but do not coach them on how to leverage that knowledge to create memorable experiences.

They, moreover, adhere to a one-size-fits-all approach, ignoring opportunities to help individual agents accentuate their unique strengths and overcome their personal weaknesses.

Many organizations are also slow to adapt and update their training, which prevents agents from swiftly adapting to new and unexpected changes. Few tailor their training to actual customer sentiment, which further blurs agents' understanding of what customers want — and how to give it to them.





[Businesses often] make policies and procedures without understanding the customer impact," explains Bowman-Pero. "They're not thinking about the impact to the customers, as well as the impact to the agents in terms of making sure they have the information to convey to the customers and a plan-B if the message causes friction.

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Seventy-three percent of organizations believe agent training is the key to reducing customer effort. Unfortunately, they are missing the opportunity.

As long as they focus on static "knowledge" rather than dynamic "intelligence," training will serve as a barrier, not a gateway, to strong contact center performance.





#### Ineffective workflows and processes

Whether through concepts like "happy agents yield happy customers" or "self-service is for transactions, agents are for complex matters," customer contact thought leaders subscribe to the idea that agents are meant to *connect* with customers. Their greatest value comes not from their ability to read scripts or perform grunt work but from their ability to engage in nuanced, dynamic conversations.

In the status quo, few customer contact operations play to this strength.

By not optimizing their self-service platforms, they compel customers to seek agent assistance for basic, transactional issues. Agents thus spend a considerable amount of time addressing trivial matters.

By not unifying their systems and making use of automation, they require agents to waste time while interacting with customers. The time agents spend searching through convoluted systems, authenticating customers or manually documenting calls is time they cannot spend in high-value interactions.

By not tailoring routing based on personality, issue or context, they subject agents to difficult conversations for which the best they can offer is a generic response. While agents should be versatile, they will inevitably be better-equipped for certain issues, customers and channels. To maximize their performance, routing should bring the *most appropriate interactions* to each agent.



### CULTIVATING AGENT INTELLIGENCE

To successfully compete on the customer experience, organizations must foster agent intelligence. They must reduce the cognitive distance between agents and customers.





When we reduce the cognitive distance between agents and customers with connected systems, giving agents access to the all customer data, they can resolve the customer's issue quickly and easily," trumpets Janefalkar. "This is what customers have come to expect—and it will empower agents and increase their job satisfaction.

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The aforementioned challenges are unfortunately creating the opposite effect. They are distancing agents from their customers, inhibiting their ability to deliver great experiences and increasing the frustration associated with their work.

Fortunately for the customer contact space, there are solutions to these challenges. Consisting of customer-centric philosophies, operational best practices and innovative technologies, these solutions are simultaneously practical and effective. They help organizations cultivate the empowered, intelligent agents who can anticipate customer needs and provide resonant support.





We [need to] provide them with a really transparent environment that allows them to optimize all their customer interactions," details Bowman-Pero. "We want to provide them with tools they need for every interaction, without second-guessing themselves. We [want to get] them continued education to make sure they're sharp and up to speed on all company developments, and most importantly, give them a voice to assist their change. Empowerment should be the full gamut – not just thinking that we've given them a few tools and they can do what we've asked them to.

### Modernizing contact center technology

Customers are demanding fast, frictionless, personalized resolutions wherever and whenever they contact support.

Modern technology directly impacts *each* of those experiential elements.

When all contact channels are integrated with each other, as well as with CRM, knowledge, collaboration and other workforce management tools, agents are able to quickly respond to customer issues. They also gain immediate insight into *who* they are assisting and *what* the desired outcome entails. Most importantly, they are able to provide and communicate a resolution — or seamlessly collaborate with a colleague or supervisor who can.

Modern contact center technology does more, however, than merely help agents better resolve the issue at hand. It also empowers *customers* and *leaders* to achieve their own objectives.

An integrated contact center environment improves the entire customer journey. When all systems are unified, customers can more freely and effectively engage with brands using their preferred channels. They also gain access to experiential benefits, such as automated callbacks, more accurate waiting times, fast authentication and proactive alerts from the business.

Leaders, meanwhile, are more capable of making intelligent workforce management decisions. With a clearer picture of gaps in the experience, workflow needs and agent weaknesses, they can optimize routing rules, recalibrate metrics, improve scheduling and update training curricula.



#### Revamping voice of the customer strategy

Connecting contact center technology is of little use if the systems do not have worthwhile data to share with each other.

To truly improve workforce intelligence, organizations must ensure they are gathering the right data — and then communicating that data in an actionable, relevant manner at the right moments.

This initiative requires a robust voice of the customer strategy. It requires the use of real-time analytics to measure sentiment, behavior and "pain points" throughout the customer journey. It requires incorporating automated, intuitive satisfaction surveys into all key interactions.

It, most importantly, requires making the voice of the customer *tangible* to individual agents. Beyond incorporating feedback into training sessions, leading organizations will allow individual agents, where possible, to personally close feedback loops. Agents will have a real-time view of how their behavior affects customer sentiment and a direct opportunity to remedy any problems.





All [the] details are entered into our customer care response process tool, and assigned to the [internal employee] best-suited to resolving the issue," says Michael Brandt regarding ABB's complaint-handling process. "Once that response has been [designed], the original agent is responsible for feeding that response back to the customer.

"We wanted to make sure our frontline staff was able to immediately see the customer's perception of how we resolved an issue.







### **Modernizing training**

Effective training is geared toward agent intelligence rather than knowledge.

While it does not ignore essential knowledge about products and processes, it focuses on a more important goal: communicating the "why" behind the operation. What are customers really demanding, what is the business ultimately hoping to achieve and what role do agents play in achieving those two objectives?

When agents understand the bigger picture, they will not feel reliant on (or prisoner to) scripts or conventional procedures. They will be able to independently make decisions based on the specific context of each interaction.

Modernizing training involves several other crucial steps.

Eighty-five percent of organizations agree that "one-on-one coaching" is crucial to a great contact center culture. *All organizations* must leverage one-on-one coaching to boost agent intelligence.

This one-on-one coaching must involve hands-on experience. In order to best perform, agents need to feel comfortable translating their unique skills into real-world scenarios.





When training agents on certain [tasks], we figured that it was something they would have to kinesthetically do," explains Bowman-Pero. "We created simulations that allowed them to do these functionalities. It was important for us to really try to think about all the different agents and how they wanted to do it, by showing them all the different formats. Having one approach just did not work for us.

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Organizations must also develop a *continuous* learning program. This effort must include a method of adapting to sudden changes — and correcting bad habits — on a real-time basis.

Example solutions include live call monitoring and assistance and learning management systems that automate lessons based on new regulations, new voice of the customer insights, or issues with a particular agent's performance.

Great training programs, moreover, require great measurement mechanisms. Specifically, organizations must develop a formal procedure for measuring the return on contact center learning. They must also evaluate the impact training curricula and technology are having on the agent experience.



### **Optimizing workflow**

Successful contact centers do not simply cultivate agent intelligence. They engineer workflows to ensure agents actually get to *use* that intelligence.

One specific pathway involves routing. By creating routing rules based on factors like personality, issue type, skill and familiarity with the customer, organizations ensure agents focus on the interactions for which they are best-suited. Intelligent routing is also beneficial for customers, who will receive more accurate information about wait times and more meaningful assistance upon reaching the live agent.

Another optimization opportunity involves adopting a complementary approach to channels. An organization might, as an example, use an automated self-service tool to authenticate the customer and gather basic details about the issue. This information is passed to the agent, who has the ability to deliver immediate, personalized support upon escalation.

Self-service technology can also provide the organization with more macroscopic insight into the customer experience. By revealing patterns about the types of issues that can and cannot be handled in self-service, these tools can help leaders prepare — and train — agents for the issues most likely to require their assistance. These patterns can also surface areas where an alert notice or a Frequently Asked Questions page could answer a customer's question without having to connect with an agent. Data from self-service interactions can additionally help agents understand the type of language that best resonates with customers.



Automation technology can also help on the backend. By helping agents access relevant data from key systems, automation empowers agents to more meaningfully communicate with customers. By handling menial tasks like post-call logging and updating case records with information and customer-provided information and media in real time, automation allows agents to devote more time to high-value engagement.





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Combined with machine learning, Al assists contact centers in finding the most efficient path for answering questions, estimating wait times, or moving to an alternate channel for resolution," says Janefalkar.



To cope with periods of high volume, organizations can provide automated callback scheduling. This ensures customers can get the experience they want at a convenient time. It also ensures agents, upon taking the call, can deliver a customer-centric experience without the distraction or pressure of a full call queue.

# CONTACT CENTER WORKFORCE INTELLIGENCE ASSESSMENT

"Agent intelligence" may be a different concept than "academic intelligence."

There is, however, one important commonality between the two: there is no limit to how much intelligence one can acquire.

Just as one can always become smarter and more knowledgeable, an organization can always do more to reduce the cognitive distance between its agents and customers. It can always provide agents with better training, more actionable customer data, easier tools, stronger workflows and greater confidence to stray from the script.

Before embarking on that journey to a more intelligent workforce, it is important to diagnose one's existing intelligence. More specifically, it is important to assess whether one's organization is empowering agents to avoid the common factors that create frustration — and poor performance — within the customer contact function.

Take this brief quiz to assess where your organization ranks:





### **Contact Center Workforce Intelligence Assessment**

the start of a call, what information does an agent typically have about the customer?  eck all that apply)
None
Name
Account number
Contact information
Transaction history
List of active goods/services
Record of customer feedback
Support history (about this specific issue)
Support history (about all issues)
Prediction regarding why customer made contact
Customer Satisfaction (CSAT) or Net Promoter Score (NPS)
w long does it take agents to authenticate customers who escalated from another annel?  No additional authentication required  Under 1 minute  Over 1 minute
en moving from self-service to a live agent, what is the likelihood that customers will have restate their name or issue?
0 (not likely at all)
3
4
5 (extremely likely)



# Contact Center Workforce Intelligence Assessment (continued)

On	average, ho	ow n	nany systen	าร m	ust agent	s ac	cess when	solvi	ing a customer support issue?
	1		2		3		4		5 or more
Car	n the same a	ager	nt support a	cus	tomer acr	oss	multiple ch	anne	els?
	No								
	Yes, but the	y ne	ed to interac	t usi	ng differer	nt sys	tems		
	Yes, but only in select channels								
	Yes								
Wh	ich of the fo	llow	ing prompt	s yo	u to introd	duce	new agent	t traii	ning modules?
	New regula	tion/	compliance	issue					
	New produc	ct lau	ınch						
	New channe	el lau	unch						
	New/upgrad	ded o	contact cent	er ted	chnology				
	Noteworthy insights from customer feedback								
	Noteworthy insights from analytics								
	Performance issues with individual agents								
	Performanc	e iss	ues with ove	erall t	eam				
Ho	w much time	e do	agents spe	end c	communic	atin	g with custo	omei	rs?
	0-20%		20-40%		40-60%	)	☐ 60-80%		80-100%
Нο	How much of that time do agents spend handling simple, transactional matters?								
П	0-20%	П	20-40%	Г	<b>1</b> 40-60%	,	□ 60-80%	ı	□ 80-100%



# Contact Center Workforce Intelligence Assessment Scoring Your Intelligence

Answers for each question reflect the level of intelligence within your contact center.

Basic (red): While capable of processing transactions, your agents lack the insight needed to personalize experiences. They will also struggle to resolve problems without undue delays. Your CSAT score will remain stagnant — even with big training investments.

Intermediate (blue): As you have begun to integrate your systems, your agents can deliver a more efficient, more personalized form of engagement. They may not, however, be able to anticipate needs or seamlessly support customers across all channels.

Advanced (green): Your empowered agents are operating at a minimum cognitive distance from your customers. They can adapt based on customer preference and intent, and in turn achieve meaningful connections within every interaction. Your actual experience may not be perfect, but you have the ability to delight your customers and outperform your competitors.

### **Taking Action**

Today is the era of customer centricity, and your agents must able to connect with customers. If your organization's "intelligence" level is basic or intermediate, you must take urgent action.

It is also the era of competing on the customer experience, which means that advanced organizations cannot rest on their laurels. You must still seize opportunities to improve.

Here are some actions you can take — right now — to boost your contact center intelligence:

- 1) Adopt a contact center platform that seamlessly integrates with CRM, analytics and all other workforce optimization tools.
- 2) Establish a "single record" for each customer, consolidating details about identity, transactions, support inquiries and feedback. Ensure this "pops" at the start of each interaction.
- 3) Allow customers to easily access support from all contact channels; ensure agents can monitor and communicate in all channels from a single desktop.
- 4) Use self-service tools to authenticate and "qualify" customers at the onset of the interaction; deploy automated post-interaction surveys to gain feedback in all channels.
- 5) Implement routing rules based on the context of the issue.
- 6) Adopt a collaboration tool that allows agents to seamlessly transfer customers, consult with their peers and access guidance from supervisors.
- 7) Leverage an automated learning management system to optimize the training process.

For more guidance on improving agent intelligence, visit www.ujet.co/learnmore.



### MEET THE AUTHOR



**Brian Cantor** 

Principal Analyst, CCW Digital Director Customer Management Practice





#CCWDIGITAL

Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital's series of reports. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.



# 2018 Special Reports Calendar

Special Reports Calendar is subject to change. Updated as of 6/1/18

Publish Date	Report Topic	Sponsorship Deadline
Jan. 2	2018 Predictions	—Dec. 15, 2017 SOLD
Jan. 16	Retail CX	<del>Dec. 20, 2017</del> SOLD
Feb. 1	Omnichannel	<del>Jan. 18, 2018</del> SOLD
Feb. 15	Messaging	—Fcb. 1, 2018 — SOLD
Mar. 1	CX Automation	<del>Feb. 15, 2018</del> SOLD
Mar. 15	Customer Intent	<del>Mar. 1, 2018</del> SOLD
Apr. 2	Brand Reputation	<del> Mar. 16, 2018</del>
Apr. 17	Outsourcing	<del> Mar. 30, 2018</del> SOLD
May 1	Customer Contact Executives	<del> Apr. 13, 2018</del>
May 15	Customer Journey Mapping	<del> Apr. 27, 2018</del>
Jun. 1	Agent Performance	<del>May 18, 2018</del> SOLD
Jun. 15	Self-Service	<del>Jun. 1, 2018</del> SOLD
Jul. 1	FP3 Experience	Jun. 15, 2018
Jul. 15	Outbound & Proactive Engagement	Jul. 2, 2018



## 2018 Special Reports Calendar

Special Reports Calendar is subject to change. Updated as of 6/1/18

Publish Date	Report Topic	Sponsorship Deadline
Aug. 1	Actionable Analytics	Jul. 19, 2018
Aug. 15	Contact Center Security & Fraud Prevention	Aug. 1, 2018
Sep. 4	The Digital CX	Aug. 21, 2018
Sep. 17	Chatbots	Sep. 3, 2018
Oct. 1	Learning & Development	Sep. 18, 2018
Oct. 15	Remote Agents	Oct. 2, 2018
Nov. 1	Future Workspaces	Oct. 18, 2018
Nov. 15	Knowledge Management	Nov. 2, 2018
Dec. 3	Live Chat	Nov. 16, 2018
Dec. 17	CX Automation Pt. 2	Dec. 3, 2018

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June 18-22, 2018 The Mirage, Las Vegas, NV www.customercontactweek.com



### **Chief Experience Officer Exchange**

July 29-31, 2018
Chicago, IL
www.chiefexperienceofficerexchange.iqpc.com



### **CCW Executive Exchange**

August 12-14, 2018
Four Seasons, Chicago, IL
www.ccwexecutiveexchange.iqpc.com



### **Customer Experience Automation**

September 5-7, 2018
San Jose, CA
www.customerexperienceautomation.iqpc.com



### **CX Week Canada**

September 12-14, 2018
The Radisson Admiral Harbourfront
Toronto, ON, Canada
<a href="https://www.cxweekcanada.iqpc.com">www.cxweekcanada.iqpc.com</a>



### **Chief Customer Officer Exchange**

November 4-6, 2018
Miami, FL
www.ccoexchange.igpc.com



### **MEET OUR ANALYSTS**



Brian Cantor

Principal Analyst &

CCW Digital Director



**Michael DeJager**Principal Analyst,
Experience Design Series



Max Ribitzky
Head of Commercial
Research



Nadia Chaity
Senior Analyst, CCO Series



Ryan Gaviria
Senior Analyst & Conference
Director, CX Series



Sandy Ko Research Development Analyst, CCW Series

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Don AldersonBusiness Development LeadE: Don.Alderson@customermanagementpractice.com



Simon Copcutt

Head of Strategic Accounts

E: Simon.Copcutt@customermanagementpractice.com