



# CCW

## CUSTOMER CONTACT WEEK EXECUTIVE EXCHANGE

August 12-14 | The Four Seasons Hotel, Chicago | [www.ccwexecutiveexchange.com](http://www.ccwexecutiveexchange.com)

**DELIVER WORLD-CLASS SERVICE WITH SPEED & EFFICIENCY**



WELCOME

# Deliver World-Class Service with Speed and Efficiency

On behalf of the Customer Management Practice, It is our pleasure to welcome you to the CCW Executive Exchange, an exclusive invitation only event! Our team of analysts and the CCW advisory board have been working tirelessly to build an unparalleled exchange experience for you.

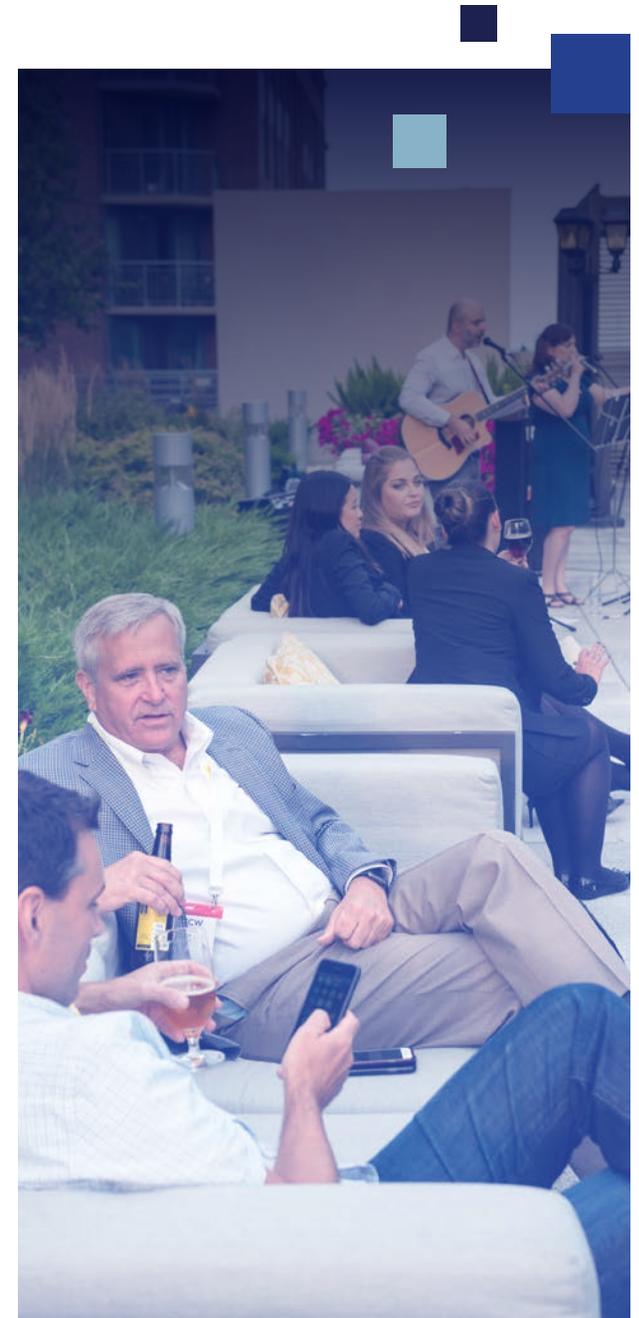
This year, we focus on delivering world-class service with speed and efficiency. We are in the “Age of the Customer”. Today’s customers are armed with unlimited choices, various channels and demand a high level of customer attention and service. Their increasing expectations and have forced organizations to transform and prepare for the CX battlefield by prioritizing the future contact center.

Join our must-attend exchange this August as we take a deep dive with a select group of contact center leaders from the C-suite to discuss strategies to make world-class service a reality.

We look forward to seeing you at CCW Executive Exchange in Chicago!

Best wishes,

CCW Executive Exchange Team!





# ADVISORY BOARD

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VP Sales &  
Service Strategy  
**USAA**



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Troy Mills  
Chief Academic  
Officer  
**CCW UNIVERSITY**



Docia Myer  
Chief Education  
Officer  
**CCW  
UNIVERSITY**



Steve Prodger  
SVP, Customer  
Experience &  
Innovation  
**SMARTACTION**



Paul Selby  
Head of Product  
Marketing  
**SERVICENOW**



Janet Solomon  
SVP, Head of Client  
Contact Center and  
Contact Center  
Operations  
**SUNTRUST**



Frank Suljic  
SVP of  
Strategic Sales  
**MATTERSIGHT**



# WHAT MAKES THE EXCHANGE EXPERIENCE UNIQUE?

## WHAT IS AN EXCHANGE?

The CCW Executive Exchange is the only event of its kind that exclusively brings together the head of the contact center. For 2 1/2 days, on an invitation-only basis, our guests enjoy a closed-door benchmarking environment that allows them to compare strategies against their true peers.

### Qualifying Criteria include:

- ▶ You have direct oversight of a sizeable contact center operation
- ▶ You control or directly influence where the contact center budget is spent
- ▶ You represent a enterprise-level or fast-growing organization
- ▶ You currently have a minimum of 3 active projects needing solutions within the next 0-24 months

DO YOU QUALIFY?



## *It's An Experience Like No Other*

The CCW Executive Exchange supports the evolution of the contact center operation. The sessions are built by our team of analysts and CCW advisory board to not only tackle the challenges of today but more importantly the challenges of tomorrow.

### Exclusive:

Sharing and exchanging ideas and concepts with your peers. Our capped attendance ensures highly interactive sessions and networking opportunities in an intimate setting.

### Strategic Event Sessions:

Brilliant, intellectual content presented by the world's most innovative contact center thought leaders is designed specifically for the strategic thinker from enterprise-level and fastest growing organizations.

### Customized Itinerary:

Select the Keynote sessions, BrainWeave® discussions and Roundtable meetings that match your active projects and current business needs. Take full control of your itinerary and time at the Exchange.

### One-to-One Business Meetings:

The business meetings provide an unique opportunity for attendees to efficiently assess solutions and services to help align with your strategic vision for tomorrow's contact center operation.

Begin building your contact center blueprint. To request an invitation, set up a call with our Head of Audience Development.

**Kenneth Haskins**  
 CXO Liaison  
**Customer Management Practice**  
 E. enquiry@iqpc.com  
 P. 646-502-3257





**Sherif Mityas**  
Chief Experience Officer  
TGI Fridays



Sherif Mityas is the Chief Experience Officer for TGI FRIDAYS responsible for the Brand's global Strategy, Digital and Technology efforts. Mr. Mityas has more than 20 years' experience in the retail and hospitality industries in both senior consulting and executive industry roles.

Prior to joining TGI FRIDAYS, Mr. Mityas served as the Managing Partner for JS Consulting and as the Chief Executive Officer for Hollywood Video/Movie Gallery.

Mr. Mityas received a B.S. degree in aerospace engineering from Boston University, a M.S. in mechanical engineering from Rensselaer Polytechnic Institute and an M.B.A. from Northwestern's Kellogg School of Management.



**Donald Hicks**  
VP of Global User Services  
Twitter



Donald Hicks is the Vice President of Global User Services for Twitter. Donald has been commissioned to transform the consumer support experience on its platform. Harmony between designing unparalleled consumer experiences, and eliciting the "wow" factor for users is where Donald's passion lies. He is determined to be the voice of consumers for Twitter. His interest in CX began 10 years ago while building the operations within Amazon's Kindle division. Motivated by the perceived impossible, and a slight bit of impatience, Donald is convinced he is here to make a differential imprint in consumer experience that others can build upon.

Donald is an alum of Stanford University, Graduate School of Business Executive Program and also earned an MBA in Finance and Bachelor's degree from Clark Atlanta University.



**Michele Watson**  
SVP Client Success  
Indeed.com



Michele Watson is Senior Vice President of Client Success at Indeed. In her role, she focuses on delivering a best-in-class customer experience for every job seeker and employer using Indeed.

Before joining Indeed in April 2017, Michele served as the Vice President of Customer Care and Payments & Risk at Walmart.com. She oversaw the online operations for customer support, fraud and payments for the world's largest retailer. Michele also served as the SVP of Global Customer Care at Match.com. She has over 30 years of customer service experience in a variety of industries and has always been viewed as a significant change agent in her organizations. Michele received a bachelor's degree in consumer science from Texas State University.



# SUCCESS STORIES: BENCHMARK AGAINST YOUR PEERS



Lynn Costlow  
SVP, Customer Care

ADT



Cathy Cox  
SVP - Omni Channel Strategy  
Business Lead

SUNTRUST BANK



Rachelle Dever  
Brand & Guest Experience Director

InterContinental Hotels Group (IHG®)



Lance Gruner  
EVP, Global Customer Care

MASTERCARD



Donald Hicks  
VP of Global User Services

TWITTER



Sherif Mityas  
Chief Experience Officer

TGI FRIDAYS



Lisa Oswald  
SVP, Global Customer Service

TRAVELZOO



Melissa Porter  
VP, Customer Relations

TAILORED BRANDS



Teresa M. Rieger  
VP, Customer Service Manager

FIRST MERCHANTS BANK



Nate Rosenthal  
Head of Global Customer Success and Operations

SQUARE



Michele Watson  
SVP Client Success

INDEED.COM



Carla Zuniga  
SVP

ALLSTATE INSURANCE COMPANY





# DON'T JUST TAKE OUR WORD FOR IT...



"I had the opportunity to attend the CCW Executive Exchange in Chicago and just wanted to take a minute and talk about how the experience has been for me - really a great opportunity to interaction with leaders across industry at my level. Surprising to find out that they are deal with the same challenges that I'm dealing with and we collaborated together to talk about ways that we can solve those. I think also having the benefit a number of vendors here to talk about those challenges we're facing and talk about how they may be able to help up solve those had made this experience extremely valuable for me."

**Aaron Carmack**  
Vice President, Home Services  
Home Depot



"I came to the exchange specifically because I wanted to meet some of my peers and get the opportunity to network with them as well and meet and hear from people about the struggles or challenges or perhaps the triumphs they've had with in their areas and organizations and learn opportunities to improve areas within my own team as well. I think the session so far especially the speakers from individual organizations have been really interesting and I think there's been some really insightful kernels that I'll definitely bring back to my work."

**Keiran Casey**  
Head of Customer Support  
Google Express



"These events are so important - important to myself as a business leader but also important to my teams. No matters how many stories you read, magazines, whether you are looking at the Harvard business review or reading books, there is nothing like getting the information face to face and there is no place to get faster than one of these sessions. I appreciate the opportunity not only to speak but to listen to a lot of the experts within our business who are in the fire and flames of everyday stress - who are in the business of looking for new ways to make their customers happy, and to understand and satisfy them."

**Tim Perek**  
Head of Customer Experience  
Schneider Electric – North America



PROGRAM

# FULL SCHEDULE

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10:30 Exchange Registration & Welcome Brunch

11:20 Speaker, Delegate & Solution Provider Orientation

11:40 Chairperson's Opening Remarks



Mario Matulich  
Executive Director



11:50 Ice Breaker Activity

12:00 Opening Address: One View of the Customer - Connecting the Dots on the Customer Journey

The customer journey is typically comprised of multiple touchpoints. The critical role is to engage and align the entire technology ecosystem to support them all. By raising the bar of higher expectations, it will drive and shape these journeys and ultimately improve the CX.



Lance Gruner  
Executive Vice President, Global Customer Care  
MasterCard

12:30 Business Meetings

1:00 Business Meetings

1:30 **MASTER CLASS: Connecting With Customers at The Speed of Life**

The world around us has changed and we are all living connected lifestyles. Customers have evolved from traditional to digital-first communications with companies. They want interactions to be fast, easy, personal, and trusted. Learn how to:

- Offer the communication channels want,
- Be available at the customer's moment of need, and
- Achieve higher satisfaction scores and lower costs by allowing customers to contact you via digital channels versus phone and email.



Danielle Wanderer  
CMO



Melissa Porter  
Vice President, Customer Relations



**MASTER CLASS: AI: Myth, Magic, or Must**

As Artificial Intelligence (AI) remains one of the hottest topics in the customer experience sector, many executives find themselves wondering what this "magical" automation really means for their businesses. If AI has you confused, intimidated--or even fearful--about potential impacts to your brand's customer experience, then this session is for you! This session will debunk the myths and present real-world examples and use cases for AI automation in the contact center, along with recommendations for where to start.



Dale Zwizinski  
SVP, North American Sales



2:00 Business Meetings

2:30 Networking Break

3:00 Ignite Challenge: Top 3 Pressing Issues Contact Center Leaders are Facing

This series of power presentations will approach top 3 challenges identified by our CCW Digital's latest market study. These rapid-fire, quick-talk presentations include three 10-minute presentations in 30 minutes.

**1. Bring Life to Incomplete Interactions**

Did you know that 75% of customers now demand a consistent experience across channels? A personalized and consistent experience gets remembered. In a world of great products, great service is much rarer. In this session we'll discuss how to seamlessly transition your customers from digital channels including web, mobile and chat to the voice channel providing a consistent experience.



Chad Hendren  
VP and GM, CX Solutions



**2. Ending Identity Interrogation in the Call Center.**

This short session will cover the rise of knowledge-based authentication, the reasons it no longer works, and the options call centers have to replace identity interrogation with new technologies.



Lance Hood  
Chief Marketing Officer



**3. Continuous Learning for Customer Experience Teams**

Join Julie Cardwell, Training and Quality Manager for Pacific Gas & Electric, as she discusses how her team has taken the initial steps to develop a continuous learning culture within their contact centers. In this conversation, Julie will:

- Provide an in-depth overview of PG&E's efforts to train up its contact centers on new IVR functionality
- Talk through how they utilized Practice, a video-based coaching solution, to accomplish this training
- And, the positive impacts of this program in mitigating anxieties and fears about IVR itself



Greg Newman  
Director of Sales



Julie Cardwell  
Training and Quality Manager  
Pacific Gas & Electric

## 3:30 **TECH TALK: Scaling Customer Centricity**

For organizations focused on customer centricity, great experiences need to become the new baseline. But how do you aggressively maximize your capacity to provide seamless service, while systematically reducing customer effort and ensuring your agents stay true to the cause? This panel will explore different points of view around scaling up CX success: we will touch on leveraging AI in combination with the human factor; gaining invaluable customer insight through interaction analysis; and utilizing language to tap into underserved yet fast growing market sectors.

Moderator:



**Max Ribitzky**  
Head of Commercial Research



Panelist:



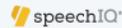
**Gene Schriver**  
CEO



Panelist:



**Nick Bandy**  
Managing Partner



Panelist:



**Dallin Bird**  
VP Global Sales



## 4:00 **Business Meetings**

## 4:30 **Business Meetings**

## 5:00 **MASTER CLASS: Fireside Chat: Using CX Analytics to Identify Root Cause of Customer Friction Points**

CCW Analyst Max Ribitzky sits down with Topbox CRO Brian Timmons to talk about how more holistic, omni-channel, and guided analytics are making contact centers (and the data they generate) the driving force behind transformational change. Brian will share how Topbox customers such as Orbitz, Cable & Wireless, and Western Union are using CX Analytics to identify the root cause of customer friction points, and discover emerging trends before they affect cost-serve and revenue.



**Brian Timmons**  
Co-Founder and CRO



**Max Ribitzky**  
Head of Commercial Research



## **MASTER CLASS: The Exception Center: Maximizing Customer Realized Value with Digitally-Enabled Customer Service**

Today's digitally connected customer expects more from customer service than ever before. Most digital services deliver recurring revenue to companies, revenue that can vanish in an instant. To ensure continuous value delivery, companies must rethink the customer's value chain, and build processes and measurements for proactively addressing issues that may arise. We will discuss:

- How to protect from value erosion
- Measurements that maximize value
- Model practices to enable continuous value delivery



**Nitin Badjatia**  
Senior Director, Product Strategy



## 5:30 **Travel Time Between Sessions**

## 5:45 **CASE STUDY: The Need for Speed - Why ADT Made Speed of Service Their Top Priority**

Speed, accuracy, and reliability are key components to create a positive experience for customers. In the age of digital, customers are accustomed to getting answers in a matter of seconds. Join Lynn as she'll discuss how she streamlined the process, trained staff thoroughly and implemented smart work flows to make sure that each of your customers have a positive overall experience.



**Lynn Costlow**  
Senior Vice President  
Customer Care ADT

## 6:15 **CLOSING ADDRESS: Transform the Guest Experience with Innovative Strategies to Drive Customer Engagement**

TGI Fridays has embraced digital in a big way by creating a real differentiation in their digital capabilities within the restaurant sector. The effort employs the latest technologies – including AI, chatbots and voice recognition— to engage with guests outside the four walls and provide opportunities for both personalized engagement and social activity to connect more deeply. What's the secret sauce? Join Sherif Mityas to learn the lessons behind his new CX strategies. In this session, he'll discuss:

- The key drivers for employing an "always on" strategy for customer engagement
- The use cases that ensure the organization is achieving real ROI from these new technologies
- The lessons learned when embarking upon this customer journey to ensure future success



**Sherif Mityas**  
Chief Experience Officer  
TGI Fridays

## 6:45 **Cocktail & Dinner Reception**



7:30 **Networking Breakfast**

8:05 **Chairperson's Opening Remarks**



**Mario Matulich**  
Executive Director



8:15 **Welcome and Industry Overview**



**Mark Bloom**  
Sr. Director, Strategy and Operations



8:45 **OPENING ADDRESS: Indeed's Mission of Customer Centricity**

Never before has customer centricity been as important as it is today. Customers are demanding a unified, consistent experience and company foundations not built around the customer will fail in delivering on these growing expectations. Join Michele Watson as she shares how her organization is answering the call to deliver value to the business while staying true to their mission- the Customer.



**Michele Watson**  
SVP Client Success  
[Indeed.com](http://Indeed.com)

9:15 **INDUSTRY INSIGHT: Getting a Seat at the Digital Transformation Table**



**Jeff Marcoux**  
Vice President of Product Strategy & Marketing



9:45 **Business Meetings**

10:15 **Networking Break**

10:45 **MASTER CLASS: Marketing and Customer Service – A “Powerhouse” Together**

Do you feel like the silo's in your organization diminish the experience you offer to your customer? Together, Marketing and Customer Service are the ultimate powerhouse, when leveraged correctly. The Customer Lifecycle is a continuous cycle that aligns to your customer' behavior, not customer service OR marketing by aligning

**MASTER CLASS: Keeping up with Consumer Trends. The Cloud can Help Tame Today, Frame Tomorrow.**

Customer service is in decline - at least traditional customer service as we know it is. The number of people who contacted customer service over the phone declined 10 percent in the last two years and contact with customer service overall has dropped seven percent over the same period according to the latest findings from the 2017 Aspect Consumer Experience Index. Consumers expressed a

internally, you will find that your CX can be improved significantly.

Breaking down internal barriers may be tough but the results exceed the effort. This session will focus on success stories of well-integrated marketing and customer service organizations while also acknowledging the challenges and obstacles that are an inevitable part of unifying these business units.



**Jason Garino**  
VP, Digital and Offline Marketing  
[WW Grainger](http://WW Grainger)



**Lynn Olson**  
VP Customer Experience



notable improvement and rise in interest with their experiences on new/emerging channels like Interactive Text Response and chatbot self-service.

Join us as we take a closer look at consumer answers to survey questions asked in the 2017 Aspect Consumer Experience Index and what their responses tell us about the changing customer expectations.

There has never been a more critical time for companies to respond to the growing consumer desire for digital channels and converge the experience across both self-service and assisted service. We will also talk about how the cloud is critical for brands to be agile in adapting to evolving customer experience demands with continuously-delivered features and functionality that a cloud-based platform delivers.



**Michael Kropidlowski**  
Director Product Marketing



11:15 **Business Meetings**

11:45 **Business Meetings**

12:15 **CASE STUDY: Turn Upset Customers Around with a Guest Recovery Solution to Increase Customer Loyalty**

In the hospitality industry, the impact of service recovery is immense. Service failures always happen that simply can't be controlled. In this session, Rachelle will share the tools needed to ensure that all guest complaints from any channels are promptly resolved. Also minimizing the cost while increasing the effectiveness of the guest recovery strategy.



**Rachelle Dever**  
Brand & Guest Experience Director  
[InterContinental Hotels Group \(IHG®\)](http://InterContinental Hotels Group (IHG®))

**CASE STUDY: Balancing a Human Touch with Automated Support**

Customers continue to demand effortless and efficient user experiences. It is vital to ensure the human element remains a core component regardless of customer's changing channel preferences. The continued improvement of virtual assistant solutions is dependent on agent's feedback and understanding as human will always play a role in providing excellent customer service experiences.



**Nate Rosenthal**  
Head of Global Customer Success and Operations  
[Square](http://Square)

12:45 **Networking Lunch**

1:45 **CASE STUDY: If Customers Are So Satisfied, Why Aren't They Happy?**

Despite the rapid deployment of digital service channels, analytic tools and automation, a disconnect between customer expectations and the services companies deliver continues to exist. Learn how Travelzoo is driving up customer satisfaction and building loyalty, and what you can do to close the customer service delivery gap.



**Lisa Oswald**  
Senior Vice President, Global Customer Service  
**Travelzoo**

2:15 **Business Meetings**

2:45 **Business Meetings**

3:15 **Interactive Roundtable Discussion**

This excellent networking opportunity puts you with your industry peers and encourages the sharing of ideas, business best practices, and discussion around a topic that is relevant to your common interests. Topics include:



<p>Customer Service Innovation Lab</p>	<p>Measurable Employee Engagement Techniques that Enhance the Customer Experience</p>	<p>How a Shift in Mindset is Impacting Customer Care in the Modern Workforce</p>	<p>Transitioning from a Contact Center to an Insight Center</p>
<p>Partnering to Identify and Implement the Best Technology and Practices to Impact Customer Satisfaction and Loyalty</p> <p><b>Jacob Bailon</b> Business Engineer Lead <b>DATAMARK INCORPORATED</b></p>	<p>Happy agents yield happy customers, so says the cliché. By improving the agent experience, businesses will cultivate these happy agents who, in turn, yield satisfied and loyal customers. But as we all know; human capital management optimization is one of the biggest pain points in the contact center industry and can hurt business growth. Join us for this discussion on what industry leaders and your peers are doing to increase agent engagement and customer experience.</p> <p><b>Evan Lichter</b> Strategic Partnership Advisor <b>dailypay</b></p>	<p>Join this interactive roundtable on how the shifting mindset and changing expectations of the modern workforce will impact your approach and strategy to acquire high performing customer experience talent.</p> <p>Key Takeaways:</p> <ul style="list-style-type: none"> <li>• Current trends in the modern workforce</li> <li>• Redefining your call center agent model</li> <li>• How deploying a modern workforce can boost your customer experience</li> </ul> <p><b>Doug DeBolt</b> Senior Vice President <b>liveops</b></p> <p><b>Jen Hanel</b> Director Business Development <b>liveops</b></p>	<p>In this roundtable discussion, we'll share strategies for using AI and advanced analytics to transition from the traditional "factory floor" model for managing customer service to a knowledge work model that encourages issue ownership, collaboration and innovation. Participants will walk away from this discussion with a better understanding of how their peers in the industry are making this transition and the results they've seen in the process.</p> <p><b>Matt Dixon</b> Chief Product and Research Officer, Tethr and Author of "The Effortless Experience" <b>Tethr</b></p>

4:00 **Business Meetings**

4:30 **Networking Break**

5:00 **INDUSTRY INSIGHT: Improve Customer Care and Increase Your Bottom Line with AI**

In today's digital world, customers expect unified experiences, across channels, 24x7x365. Companies are transforming customer service and resolving queries faster and more cost-effectively than ever before. Discover how successful brands are taking advantage of the opportunity to shape customer experiences using Watson.



**Saurabh Shah**  
Director- Global Business Services, Global Leader- Cognitive & Analytics  
**IBM Watson**

5:30 **TECH TALK: Driving Performance**

As the agent's role grows into an increasingly complex one, the human element becomes all the more critical to your organization's success. How do you allocate the right person for the right job, and to what extent can you analyze and support their interactions with your customers in near-real time? This insightful expert panel will allow you to delve deeper into the issues of optimizing productivity, workforce management and tried and proven strategies to support your agents and drive their everyday performance.

Moderator:



**Max Ribitzky**  
Head of Commercial Research  
**CMP**

Panelist:



**James Pipkins**  
President  
**Pipkins**

Panelist:



**Matthew Storm**  
Product Marketing Director - Customer Experience Management  
**opentext**

6:00 **CLOSING ADDRESS: Allstate's 'Digital Colleague' - A Blend of Human Intelligence and Problem Solving with Technology**

Hear about our AI-powered Virtual Assistant, designed to help Allstate employees by increasing the accuracy of interactions with customers, reducing the duration of customer calls, and resolving customer inquiries faster and more often. It's reduced the complexity by giving better and quicker access to information, policies and procedures to increase the overall customer experience.



**Carla Zuniga**  
SVP  
**Allstate Insurance Company**

6:30 **Cocktail Reception**



8:00 **Networking Breakfast**

8:35 **Chairperson's Opening Remarks**



**Mario Matulich**  
Executive Director



8:45 **OPENING ADDRESS: From the Ground Up: Rebuilding the CX Operations in a World with 280-character**

Twitter has evolved to become more than emergent platforms for providing consumer support and to communicate with a brand. So when they wanted to grow the global footprint and assure superior customer experience, speed of response was critical. This can elevate your customer service efforts from acceptable to exceptional. The better your social care, the more loyal user you can expect. Join Donald to learn how he is bringing users back to the platform to increase customer lifetime value by providing superior customer experience.



**Donald Hicks**  
VP of Global User Services  
Twitter

9:15 **CASE STUDY: Self service Vs. Assisted Service - The New Battlefield of CX**

Customers are getting savvier and expect service on-the-go. In response, enterprises are rapidly investing in self-serve solutions with advanced automation capabilities that provide seamless service and do not compromise the experience. Innovative and disruptive technologies such as machine learning, biometrics, artificial intelligence, and robotic process automation are taking center stage to re-define traditional engagements.



**Cathy Cox**  
SVP, Omni Channel Strategy Business Lead  
SunTrust Bank

9:45 **Business Meetings**



10:15 **Business Meetings**

10:45 **Networking Break**

11:15 **CASE STUDY: SMS Texting for Customer Service - Talk to Your Customer in a Way They Prefer!**

Texting is a quick and convenient way to communicate a problem. It puts the power of communication in the hands of the customer's which will go a long way to improve understanding, their perception of the service and experience they receive, increase engagement and trust and, ultimately, will improve your rate of acquisition and retention.

- Resolve Issues faster and eliminate wait on hold
- Provide options for engagement creating a customized service experience
- Offer human text-based customer service



**Melissa Porter**  
VP, Customer Relations  
Tailored Brands

11:45 **CLOSING ADDRESS: Building a Digital Bridge – Optimize Efficiency with Workforce Management**

The Contact Center is no longer only a center to receive complaints, but a treasured hub to deliver a quality customer experience. Streamlining tasks with a platform that delivers on workforce optimization, quality and intelligence is key.



**Teresa M. Rieger**  
VP, Customer Service Manager  
First Merchants Bank

12:15 **Chairman's Closing Remarks**

12:30 **Exchange Concludes**





## SOLUTION PROVIDERS



### **Salesforce** • [www.salesforce.com](http://www.salesforce.com)

Service Cloud, the world's #1 intelligent customer service platform, enables companies to transform the customer experience with smart customer service conversations across every channel. Whether engaging customers via messaging, video, communities, web chat, in-app, email, phone or even communicating directly with connected products, Service Cloud helps leading brands use service as a competitive advantage by delivering personalized, connected customer service experiences across every channel



### **Mattersight** • [www.Mattersight.com](http://www.Mattersight.com)

Mattersight is a leader in enterprise analytics focused on customer and employee interactions and behaviors. Mattersight's Behavioral Analytics service captures and analyzes customer and employee interactions, employee desktop data, and other contextual information to improve operational performance and predict future customer and employee outcomes. Mattersight's analytics are based on millions of proprietary algorithms and the application of unique behavioral models. The company's SaaS+ delivery model combines analytics in the cloud with deep customer partnerships to drive significant business value. Mattersight's applications are used by leading companies in Healthcare, Insurance, Financial Services, Telecommunications, Cable, Utilities and Government.



### **VHT** • [www.vhtcx.com](http://www.vhtcx.com)

VHT offers a suite of complementary, patented solutions that help organizations optimize the customer journey in order to achieve greater loyalty, efficiency and revenue. Omni-channel solutions provide the opportunity to enrich the brand and deepen the customer relationship with every interaction. Deployed seamlessly within any single or multivendor environment, our virtual queuing and customer engagement solutions are designed to empower customers, and agents.



### **Datamark.Inc** • [www.datamark.net](http://www.datamark.net)

DATAMARK provides a wide range of outsourced back-office services, including contact center services; high-volume digital mailroom and mail center management; and data entry, document processing and document management. Our Business Engineering team delivers process improvement consulting, applying Lean Six Sigma and other methodologies to streamline workflows and improve process quality.



### **TTEC** • [www.TTEC.com](http://www.TTEC.com)

TTEC is a leading global provider of customer experience, engagement and growth solutions. We help some of the world's top brands acquire, serve and retain their customers through: customer care, tech support, acquisition and sales, analytics, technology, and CX consulting. We partner with business leadership across marketing, sales and customer care to design and deliver a simple, more human customer experience across every interaction channel, driving increased revenue, improved profitability and deeper customer loyalty. With more than 48,000 employees and 85 sites around the world, TTEC interacts with 3.5 million customers every day in 23 countries.



### **IBM Watson** • [www.ibm.com/watson](http://www.ibm.com/watson)

IBM Watson is the AI platform for business, powered by data. Watson can turn unstructured business data into actionable insights that enhance decision making. Watson understands the world in the way that humans do through senses, learning and experience. It learns at scale, reasons with purpose and interacts with humans naturally.



## SOLUTION PROVIDERS



**Pindrop** • [www.pindrop.com](http://www.pindrop.com)

Pindrop® solutions are leading the way to the future of voice by establishing the standard for security, identity, and trust in the call center. Pindrop® solutions help detect fraudsters and authenticate callers, reducing fraud and operational costs, while improving customer experience and protecting brand reputation for some of the world's premier call centers.



**Service Now** • [www.servicenow.com](http://www.servicenow.com)

ServiceNow is changing the way people work. With a service-orientation toward the activities, tasks and processes that make up day-to-day work life, we help the modern enterprise operate faster and be more scalable than ever before. Customers use our service model to define, structure and automate the flow of work, removing dependencies on email and spreadsheets to transform the delivery and management of services for the enterprise. ServiceNow provides service management for every department in the enterprise including IT, human resources, facilities, field service and more. We deliver a 'lights-out, light-speed' experience through our enterprise cloud – built to manage everything as a service.



**Smart Action** • [www.smartaction.ai](http://www.smartaction.ai)

SmartAction offers a cloud-based artificial intelligence engine that provides 100% natural language self-service. The engine, known as IVA®, allows customers to easily complete requests that had traditionally required live customer service agents. By automating these conversations, SmartAction helps companies provide an effortless customer experience while reducing operating costs. Clients include MGM Resorts International, Royal Caribbean Cruises Ltd., AAA/CAA, TechStyle Fashion Group, and many more across more than ten industries.



**Quiq** • [www.goqui.com](http://www.goqui.com)

Quiq makes it easy for customers to contact a business via Messaging, the preferred channel already in use with our friends and family. With Quiq, customers can now engage with companies via SMS/text messaging, Facebook Messenger, Live Chat, and Kik for help with their pre-sales and post-sales questions. Quiq Messaging can be deployed as a stand-alone application or seamlessly integrated with your existing CRM application, like Oracle, Salesforce.com, and Zendesk. Built with enterprise-class capabilities, companies like Gogo, Jackson Hole Resort, Office Depot, Overstock.com, and Tailored Brands use Quiq Messaging to dramatically reduce operational costs and improve the customer experience.



**Intradiem** • [www.intradiem.com](http://www.intradiem.com)

Intradiem arms contact centers with a real-time solution that streamlines operations and builds a solid foundation in a complex environment. The advanced automation platform creates significant and rapid cost reduction and agent performance benefits. Over 230,000 contact center employees use Intradiem's solution daily.



**Practice** • [www.practice.xyz](http://www.practice.xyz)

Practice is an applied microlearning solution used to foster continuous learning cultures that increase competence and confidence and drive innovation. Practice does this by creating a scalable means for teams to frequently practice skills and receive meaningful, timely feedback through peer-to-peer video assessment and coaching. Practice's patented mobile-first video technology and learning methodology is used by organizations such as Comcast, Domino's, PepsiCo, and UPenn for reinforcement of new skills, fostering feedback, and facilitating collaboration.



## SOLUTION PROVIDERS



### **Bit-Lever** • [www.bit-lever.com](http://www.bit-lever.com)

AgentPRO by Bit-Lever is a Gamification and Business Intelligence platform that drives dramatic increases in your Agent engagement and Management efficiency. Your Agents crave clear direction and your Managers want an easier way to give it to them. AgentPRO is the solution. With AgentPRO your team will have the tools to centralize data, analyze trends, benchmark performance, and reward their agents with gift cards. Bit-Lever is a software company offering applications for Business to leverage big data, automate the mundane, and inspire the user



### **Aspect** • [www.aspect.com](http://www.aspect.com)

With software used by millions of agents every year and supporting billions of consumer interactions around the world, Aspect's mission is to profoundly simplify and significantly improve customer engagement. Our solutions engage consumers, empower agents, improve quality, and lower the cost of delivering remarkable experiences. The native cloud customer self-service, contact center interaction management and workforce optimization capabilities are combined with next generation components while leveraging Aspect's breadth and depth of proven technology. The robust, intuitive and beautifully-designed software, delivered via our cloud, private cloud and on-premises, provides everything needed to delight consumers and employees alike.



### **CSS Corp** • [www.csscorp.com](http://www.csscorp.com)

CSS Corp is a new age IT services and technology support company that harnesses the power of artificial intelligence, automation, analytics, cloud and digital to address customer needs. The company partners with leading enterprises to help realize their strategic business outcomes. Its team of 5,500 technology professionals across 16 global locations is passionate about helping customers differentiate and succeed.



### **Sitel** • [www.sitel.com](http://www.sitel.com)

Sitel Group is one of the largest customer experience management companies in the world. The group is comprised of industry-leading firms providing business process outsourcing, digital marketing, training and talent management, technology and innovation, consulting and analytics solutions. The group's services are leveraged across geographies, verticals and all stages of the customer journey, helping clients effectively harness the industry's explosive digital transformation and consistently deliver outstanding customer experiences.



### **PTP Inc** • [www.ptpinc.com](http://www.ptpinc.com)

PTP is a professional services firm wholly focused on helping organizations deliver strategic customer experience solutions that drive revenue. We provide strategy, implementation and support services across the most common Contact Center, CRM and Security technology platforms.



### **AppFusions** • [www.appfusions.com](http://www.appfusions.com)

As their tagline says, AppFusions is a long-time pioneer in "connecting the enterprise". From their packaged Web portal integrations for cloud or on-premise, to their all-in-one scalable enterprise integrated digital workplace, called Aloha - AppFusions are experts in the tricky and complicated world of modern integration hard-knocks. Their field-vetted solutions connect dozens of apps, like Salesforce, Box, Dropbox, Microsoft apps, Atlassian apps, GitHub, ServiceNow, Slack, and many others. Their silo-busting deep workflow integrated experiences are holistic and cohesive, and can be deployed and running in minutes for the cloud, and within a day or two for on-premise. These are sophisticated solutions -- vetted, proven, and ready-to-go. Hard things can be simple.



### **DailyPay** • [www.dailypay.com](http://www.dailypay.com)

DailyPay is a technology solution that lets your employees control the timing of when they get paid, empowering them to meet their financial goals. Employees who find financial security at your company stay longer, reducing your turnover and improving bottom line profits.



## SOLUTION PROVIDERS



### **Creative Virtual** • [www.creativevirtual.com](http://www.creativevirtual.com)

Creative Virtual is a global leader in conversational self-service solutions that bring together humans and artificial intelligence to enable anywhere, anytime customer and employee engagement. Leading global organizations rely on our award-winning V-Person™ technology to improve their support experience, reduce costs, increase sales and build brand loyalty. Backed by an experienced, expert team as well as an extensive partner network, our innovative virtual agent, chatbot and live chat solutions, along with our knowledge management and business intelligence platform, empower companies to provide consistent, accurate, personalized and seamless omnichannel engagement.



### **SpeechIQ**

SpeechIQ is a revolutionary, cost-effective speech analytics and quality management platform that makes it easy to unlock the vast amount of data within your call recordings. Through an exceptionally easy to navigate platform, it's easier than ever to analyze calls for compliance, script adherence, sales effectiveness, and more. See why more and more companies are turning to SpeechIQ to help drive agent productivity, operations efficiency and improved customer engagement.



### **Topbox** • [www.topbox.io](http://www.topbox.io)

Topbox's customer experience analytics software is the only omni-channel solution to aggregate and synthesize data from every customer interaction for deep analysis. A sophisticated classification model normalizes data from disparate channels, technology platforms, and languages, and applies a contextual framework specific to your business to deliver the most relevant and actionable analysis. This intelligence powers a transformative, customer-centric approach to product management, sales and marketing, and support services.



### **Five9** • [www.five9.com](http://www.five9.com)

Five9 is the largest pure cloud contact center software provider with more than 1,600 customers and facilitating more than 3 billion calls per year. The Five9 VirtualContact Center and Predictive Dialer are revolutionizing the contact center industry, bringing the power of the cloud to customer service and sales organizations around the globe. The company gives enterprises of all sizes access to sophisticated and innovative contact center solutions quickly, at a cost of ownership far lower than traditional premise-based solutions.



### **Yodel Voice** • [www.yodelvoice.com](http://www.yodelvoice.com)

Yodel is a Global leader in the Human Driving virtual intelligence marketplace. Yodel's proprietary Avatar's are designed to deliver a seamless end to end Human touch experience for your customers. We handle inbound/outbound scenarios with an intent to drive increased customer acquisition, customer satisfaction and customer service levels at a more efficient and cost effective model.



### **Pipkins** • [www.Pipkins.com](http://www.Pipkins.com)

A privately-held, American-owned company, Pipkins, Inc. was founded in 1983. Headquartered in St. Louis, Missouri, the firm is a leading supplier of workforce management software and services to the contact center industry, providing sophisticated, cloud-based forecasting and scheduling technology for front and back office and at-home/offsite workers, as well as other fully integrated solutions for performance management, real-time adherence, time and attendance tracking, task tracking, compliance monitoring, mentoring, collaboration and more.



## SOLUTION PROVIDERS



### Directly • [www.directly.com](http://www.directly.com)

At Directly, we believe the fundamental nature of work is changing from fixed to fluid, as AI and collaborative technology transform how people and companies work in the next economy. We're leading this shift with an enterprise platform that changes the way companies think about customer support. Our Crowd-Powered AI platform combines messaging, machine learning and gig work to transform and scale customer service for world-class companies like Autodesk, LinkedIn, Microsoft, Pinterest, Samsung, and SAP. We're based in San Francisco and backed by top venture firms and angels from Silicon Valley.



### LiveOps • [www.liveops.com](http://www.liveops.com)

Liveops offers an on-demand skilled workforce of onshore home-based agents for customer service and sales. With no call center overhead or wasted idle time plus the ability to source agents nationwide, our pay-per-use model scales to meet seasonal or time of day spikes in demand. More than 400 organizations across service industries including retail, healthcare, insurance and telecom trust Liveops to deliver an enterprise-grade workforce with far greater customer satisfaction scores than traditional call centers.



### Kylie • [www.kylie.ai](http://www.kylie.ai)

Kylie analyzes customer support messages to provide agents with automated responses. Kylie provides a cloud-based support ai that integrates with any text-based support system (Zendesk, Twitter, email, etc) even those developed in-house. Our technology automatically clones employee & brand personalities to deploy and scale communication across any medium Website: [www.kylie.ai](http://www.kylie.ai)



### Augment • [www.augmenthq.com](http://www.augmenthq.com)

Augment is a leader in customer experience-driven artificial intelligence (AI). Augment's human-in-the-loop AI uniquely empowers employees to deliver a superior customer experience by surfacing the best information and answers across the enterprise in real time. Augmented agents deliver improved brand experience through messaging and live chat applications preferred by consumers, and then convert more of these interactions into customer delight and revenue.



### Tethr • [www.tethr.com](http://www.tethr.com)

Tethr helps organizations unlock value from the voice channel. Tethr's conversation intelligence platform combines powerful AI and a decade of customer research to analyze phone calls and offer insights that can improve sales, loyalty, efficiency and compliance.



### TRUSTID • [www.trustid.com](http://www.trustid.com)

TRUSTID allows customer contact centers to automatically authenticate callers before their calls are answered. Using a patented approach that analyzes calls within the global telephone network, TRUSTID's pre-answer caller authentication enables companies to significantly reduce customer identity interrogation and thus decrease contact center costs, improve the customer experience and focus more fraud-detection resources on true threats.



### OpenText™ Qfiniti • [www.opentext.com/qfiniti](http://www.opentext.com/qfiniti)

OpenText™ Qfiniti delivers a unified, centrally managed platform for multichannel interaction analysis, with realtime agent support, workforce management and contact center performance management capabilities. Engineered to operate seamlessly together, each component can be deployed as a standalone product as necessary to solve the most urgent contact center management needs. More than 100,000 companies already use OpenText solutions to unleash the power of their information. To learn more about OpenText Qfiniti visit [www.opentext.com/qfiniti](http://www.opentext.com/qfiniti).



## SOLUTION PROVIDERS



### **GLOBO** • [www.helloglobo.com](http://www.helloglobo.com)

GLOBO is a B2B communication platform provider, specializing in translation and interpretation technology, services, data and insights. Through GLOBO's omni-channel platform, GLOBO HQ, organizations gain access to a comprehensive suite of translation and interpreting solutions in order to interact with consumers across 250 languages. GLOBO's community of thousands of vetted, professional linguists are available 24/7 - by phone, text or video - at the touch of a button. GLOBO's robust data and insights into linguistically diverse populations help enterprises penetrate these fast-growing market segments. GLOBO's full range of omni-channel services include on-demand telephone interpreting, video remote interpreting and email & chat translation, as well as project-based marketing transcreation, text translation, localization and on-site interpreting.



### **Liveperson** • [www.liveperson.com](http://www.liveperson.com)

LivePerson makes life easier by transforming how people communicate with brands. Our 18,000 customers, including leading brands like Citibank, HSBC, Orange, and The Home Depot, use our conversational commerce solutions to orchestrate humans and AI, at scale, and create a convenient, deeply personal relationship — a conversational relationship — with their millions of consumers. For more information about LivePerson (NASDAQ: LPSN), please visit [www.liveperson.com](http://www.liveperson.com).



### **Mitel** • [www.mitel.com](http://www.mitel.com)

A global market leader in enterprise and mobile communications powering more than two billion business connections, Mitel (Nasdaq:MITL) (TSX:MNW) helps businesses and service providers connect, collaborate, and provide innovative services to their customers. Our innovation and communications experts serve more than 60 million business users in more than 100 countries. For more information, go to [www.mitel.com](http://www.mitel.com) and follow us on Twitter @Mitel.



### **Coveo** • [www.coveo.com](http://www.coveo.com)

Coveo uses intelligent search and AI technologies to personalize every digital experience for customers, partners, dealers, and employees. Coveo combines unified content, unified interactions and machine learning to deliver relevant information and recommendations across every business interaction, making websites, ecommerce, contact centers and intranets efficient, effortless and content-rich. Coveo is also embedded in many leading business applications from vendors including Adobe, Microsoft, Salesforce, Sitecore, Xero and more. Coveo partners with the world's largest enterprise technology players and has more than 1,500 activations in mid-to-large sized global organizations across multiple industries.



# VENUE AND ACCOMMODATION

## *Four Seasons Hotel Chicago*

120 East Delaware Place  
Chicago, Illinois 60611-1443  
Tel. +1 (312) 280-8400

Welcome to Four Seasons Hotel Chicago, located steps away from the famed Magnificent Mile, glamorous North Michigan Avenue shopping, and minutes from the city's business and financial centres. Explore the highest luxury guest rooms in the city with unrivaled Lake Michigan and skyline views. The award-winning Hotel has received a Forbes Five Star rating for 22 years in a row, the coveted AAA Five Diamond Award for 27 years, and is honored to be ranked as one of TripAdvisor's Top 25 Luxury Hotels in the United States.





# UPCOMING EXCHANGES

## **CHIEF EXPERIENCE OFFICER EXCHANGE**

July 29-31, 2018

Eaglewood Resort, Greater Chicago

[www.chiefexperienceofficerexchange.iqpc.com](http://www.chiefexperienceofficerexchange.iqpc.com)

## **CHIEF CUSTOMER OFFICER EXCHANGE**

November 4-6, 2018

Hotel Colonnade, Coral Gables

[www.ccoexchange.iqpc.com](http://www.ccoexchange.iqpc.com)

## **CCW EXECUTIVE EXCHANGE**

December 2-4, 2018

Hotel Colonnade, Coral Gables

[www.ccwexecexchange.iqpc.com](http://www.ccwexecexchange.iqpc.com)

