



SPECIAL REPORT:

LEARNING & DEVELOPMENT

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INSTRUCTURE

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SPECIAL REPORT: CONTACT CENTER LEARNING & DEVELOPMENT



The good news—organizations generally appreciate the role agents play in the customer experience. Insofar as they understand that value, they understand the philosophical importance of a great agent development strategy.

Unsurprisingly, training and coaching continue to rank as top strategic (and financial investment) priorities for contact center functions.

The bad news—“training” does not automatically create agents who can thrive in the era of customer centricity. In fact, the typical version of training tends to be very limited, focusing on sharing knowledge that, at best, tells agents what to say. It doesn’t instruct them on when, how or why to share that information. It doesn’t help them build connections.

Just as importantly, it doesn’t help them to grow as a team or as individuals. It brackets agents into two buckets: those who know the product and script and those who don’t.

To truly connect with customers, we need to break from that binary mindset. We need to think about continuous, personalized improvement for each agent. And we need to tie that development to specific company ambitions, customer demands and marketplace trends.

Happy agents yield happy customers, but skilled, effective and engaged agents yield loyal ones. By revealing a blueprint for elevating learning and development, this report will help you create the latter class of agents—and thus the latter class of customers.

It begins by revealing factors that are transforming the learning and development environment. It subsequently dives into the strategic mindsets and actionable solutions that elevate learning and development.

FACTORS IMPACTING THE LEARNING AND DEVELOPMENT LANDSCAPE



Learning and development has always been a fundamental customer contact center concern, but certain trends are making it *particularly relevant* in the modern business climate.

Encompassing changing customer demands, new technology and evolving perceptions of what factors matter to agents, these trends confirm that learning and development are not concepts to keep in the back of the mind. They represent *urgent* customer contact priorities.

They, more importantly, reveal why and how businesses must transform their approach to employee development. The best practices of yesterday will *not* necessarily produce agents who can wow the customers of today.

The era of customer centricity

Sixty percent of customers consider switching to a competitor after one or two bad experiences; many will switch even if the competitor charges more or offers an inferior product. Half of customers will pay more for a better experience.

These statements speak to an undeniable reality: today's businesses are competing on the customer experience. Evidenced by the extent to which they incorporate "customer centricity" into their mission statements, marketing copy and board meetings, organizations fully accept that reality. They fully recognize that their financial success hinges on their ability to meet customer demands.

Thanks to those realizations, leaders are working more tirelessly to identify those demands. They have always known satisfaction is important; now they know how to drive it.

They know that customers want frictionless, personalized, predictive and proactive experiences (the “FP3 Experience”).

Agent development must be geared to those areas. Customer-facing employees must operate with cognizance of the effort they are creating, the extent to which they are personalizing experiences, and their ability to anticipate and resolve future customer needs.

In addition to *making* the FP3 Experience an integral part of training, organizations must also ensure FP3 drives performance management strategies. Agents rely on metrics to properly calibrate their work, and leaders rely on metrics to identify operational gaps. Without the appropriate metrics, neither leaders nor agents can properly diagnose problems or develop the best possible training.

While the FP3 notion broadly captures the demands of today’s customers, it cannot capture the nuances of all customer bases or industries. It therefore cannot represent the entirety of the training effort.

To properly tailor their training, organizations should leverage innovative customer feedback, journey-mapping and real-time analytics solutions. These tools provide a vivid window into the voice of the customer, which provides a detailed blueprint for training agents.

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[Customer-centric training] comes from knowledge derived from and skill shared through practical customer journey mapping exercises within the holistic customer experience ecosystem,” reveals Emily Foote of Instructure. “The customer contact function can use these skills to not only diagnose issues and roadblocks within the journey but help the rest of the organization improve processes to change how the customer experiences the rest of their journey.

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Agent retention

Agent attrition remains a major challenge for contact centers, but leading organizations no longer fear it as insurmountable. They are not accepting the cost of turnover as the price of doing business; they are aiming to thoroughly develop and retain their best performers.

Agent satisfaction, in fact, represents a top contact center performance objective. Earlier this year, CCW Digital research also confirmed the agent experience as one of the five biggest contact center priorities for 2018.

Neither is surprising. Beyond the “happy agents = happy customers” adage, it is important to consider the costs of agent dissatisfaction and attrition. When agents are disengaged, they do not possess the same motivation to perform. The customer experience ultimately suffers.

When agents leave, they take their output and knowledge with them. The organization will have to invest more in recruiting and training, with no guarantee that either will fill the void left by the departed agents.

By virtue of its positive impact on the agent experience, successful learning and development helps eliminate these crippling costs.

Coaching, for starters, represents one of the top agent satisfaction drivers. By incorporating a robust, personalized one-on-one coaching effort into the overall development mix, the organization will create more satisfied (and obviously more talented) agents.

A robust, persistent learning and development program also helps engage the agent in the overall business. The agent will understand the organization's objectives and operating principles, while also sensing a greater degree of commitment and appreciation from leadership. More loyal to the business, these agents will stay longer.

Boosting retention is, of course, only useful if the agents who stay are highly skilled, knowledgeable and effective. A great learning and development strategy cultivates such agents. It allows organizations to bring agents up to speed quickly, while ensuring they consistently improve over time. It also creates internal experts who can share their knowledge with peers, thus building a more attractive overall community.



Rise of self-service and automation

It may not be *quite* as ubiquitous as “the customer is always right,” but the notion that “self-service should handle transactional matters, while agents should focus on complex ones” is surely familiar to many within the customer contact space.

Familiarity is not, however, a synonym for preparedness. Agents are not necessarily *ready* for complex issues, which means organizations cannot yet embrace the aforementioned dichotomy.

By bridging that competency gap, a great learning and development strategy helps organizations optimize workflow.

The strategy must prepare agents for two particular dimensions. First, it must empower them to actually handle escalations from self-service. From navigating the systems to properly greeting a customer who tried to escalate, agents must know how to operate in an environment that makes heavy use of bots and other “non-human” tools.

The second and arguably more important aspect concerns the ability to handle complex issues. With a great learning strategy, organizations can prepare agents to tailor conversations, demonstrate more empathy and quickly resolve problems for which a script may not even be possible, let alone desirable.

While chatbots may be commanding the buzz, process automation technology is also transforming the contact center—and learning and development—landscape. By removing mundane tasks from their plates, such technology impacts workflow and thus the types of issues for which agents must be trained. Great learning management systems also leverage automation to create more productive agent education.

Changing Workforce Dynamic

Many of today’s organizations are expanding into new regions, leveraging outsourcing for certain customer contact functions and offering remote or at-home agent capabilities.

Collectively, these factors create a new challenge for learning and development strategies.

Since agents will not always be under the same roof, conventional “training” becomes harder to execute.

Organizations will need to leverage learning technology that can span different physical environments. They will also need to develop a learning “curriculum” that honors agents’ unique preferences and circumstances while still ensuring agents have consistent access to essential company, product and process knowledge. Ideally, they will be able to monitor remote agents’ development in real time.

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Unlike most other corporate training structures, we can’t mandate training. We can only offer it and hope they take it,” explains Lance Pendelton of Sotheby’s International. “With Bridge [from Instructure], we can offer it, track it, and most importantly, adapt it to meet the different needs of each office.

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The challenges of creating adaptive, yet consistent learning will only grow moving forward. As digital communication takes flight, the notion of a conventional “contact center” will become further antiquated. Generational shifts and the growing need for channel specialists will add diversity to the work environment, further emphasizing the importance of agility and accessibility in the learning and development process.

DEVELOPING YOUR LEARNING STRATEGIES: THE NEW MINDSET



What is in a name? A great deal, the customer contact community will argue.

To demonstrate the importance of engaging in new channels, thought leaders replaced the term “contact center” with “call center.” To illustrate the importance of looking beyond individual transactions, thought leaders introduced the idea of a “customer journey.”

To reveal the importance of a more intimate, personalized approach to training, thought leaders gravitated toward the term “coaching.”

To articulate the need to make employee education a perpetual, ongoing priority, thought leaders are embracing the term “learning and development.”

But just as calling one’s “call center” a “contact center” did not suddenly empower an organization to deliver an omnichannel experience, adopting the term “learning and development” is not an automatic ticket to more engaged and productive agents.

To truly elevate customer contact education, organizations must adopt a learning and development *mindset*.

Emphasize performance evolution

Agent training is not simply about getting agents “up to speed.” It’s about constantly working to develop and connect their strengths with the ever-changing needs of your customers.

In order to meet the latter requirement, organizations must view development (including training and coaching) as a pathway to a stronger, more efficient and more customer-centric contact center operation. They must focus on empowering success rather than merely imparting knowledge.

The goal is not to determine what agents need to know to handle today's issues. It is not to remedy existing performance bottlenecks and challenges. It is to create an agile, ever-evolving program that ensures agents are *consistently* becoming more knowledgeable, more skilled and more capable of wowing customers.

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Everybody gets [ongoing] coaching,” says Brian Johnson of Hotwire. “No matter who you are, we expect supervisors to spend at least 30 minutes a week on your coaching. [This includes] talking about how you can improve, as well as what you're doing well. Celebrating success, and then giving feedback on growth. It's just part of the culture.

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To ensure this mindset sticks, organizations cannot merely view it through the lens of agent training. They must adopt continuous improvement as an overall mantra for the customer contact function.

Consider technology investments, as an example. Short-sighted, “training-minded” leaders work to secure budget for exciting new solutions that can solve today's problems.

Long-term, development-driven leaders focus on securing persistent trust and leeway to adapt to changes in the landscape. Whether they are changing processes, updating technology or developing new agent skillsets, these leaders have the power to drive evolution without delay.

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Creating training pathways that enable teams, peers and managers to create cultures of learning that encourage the adoption of new process improvements and also inspire the curation of new ideas for continued growth and development of skills, tactics, and techniques,” says Foote.

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Focus on the agent journey

Customer contact thought leaders scoff at the transactional approach to the customer experience. Such an approach ignores the importance of the overall customer experience journey and thus fails to properly predict customer needs, adapt to new demands and strengthen the relationship over time.

The same issue impacts the agent experience. When organizations fail to appreciate the idea of an agent journey, they fail to build the relationships that increase agent retention and productivity.

To elevate agent development and in turn create a more valuable contact center atmosphere, organizations must recognize the agent experience as a journey. Leveraging insight into performance and voice of the agent feedback, they must identify how agent sentiment and behavior are changing over time, while detailing how management can adapt to create more value. In many cases, that adaptation will involve implementing new, personally relevant learning opportunities.

Since efforts to optimize the agent journey hinge on the voice of the employee, it is utterly imperative to create a communicative and collaborative environment. Agents must feel wholly empowered to share their thoughts, feedback and expectations with fellow employees of all seniorities. When agent intelligence flows freely, identifying opportunities to orchestrate a better journey becomes exceedingly easy.

Another pivotal step involves the creation of personalized development roadmaps for each agent. Since training, coaching and support must be tailored to each individual agent's unique knowledge gaps, weaknesses and preferences, leaders require a microscopic look at each agent's journey. They must understand what the agent uniquely requires to improve, as well as what the agent uniquely requires to feel more valued.

Measure return on learning

An organization cannot manage what it cannot measure.

That reality explains why a substantial number of organizations cannot optimize their agent development strategies.

Whereas most contact centers have mechanisms for managing agent performance—be it through “efficiency” metrics like average handle time or “outcome” metrics like CSAT and NetPromoter Score—far fewer measure the impact training has on that performance.

Lacking a clear sense of “return on learning,” these organizations cannot properly optimize their training, one-on-one coaching and overarching agent development practices.

Given the urgent importance of learning, they cannot allow that gap to linger. They must adopt an in-depth, multi-faceted mechanism for assessing the impact of their development efforts.



When implementing that mechanism, they must remain married to the idea of “*return on learning*.” The goal is not merely to test whether agents are acquiring knowledge; it is to determine how they are consistently leveraging new knowledge to improve the experience.

“Return on learning” should thus account for customer and agent satisfaction in addition to conventional quality metrics.

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Organizational agility, employee retention and engagement, rate of innovation, market share, and overall business impact and operational goals are some indicators of ROI from solid learning and development programs,” offers Foote.

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We use the Kirkpatrick Model to evaluate training,” adds Johnson. “It’s not just about retaining information but can they actually demonstrate it back on the job.

[We specifically focus on DSAT]. In our particular offering, we have restrictive policies. Sometimes that makes it difficult for customers in that most of the bookings they make with us are a final booking. For all intents and purposes, the agents’ hands are sometimes tied. Because of our policies, they’re already at a disadvantage for leveraging CSAT, so we might not be able to get [satisfaction] on all calls. But what we do know is that our agents can excel at not creating DSAT (dissatisfaction).

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Foster a learning culture

Calls for an emphasis on continuous improvement, agent journey mapping and return on learning measurement ultimately lead to a pivotal conclusion: the organization must adopt a culture of learning.

This culture, notably, requires a two-way approach. It involves building a development roadmap that will consistently provide agents with what they need to improve. The agents, moreover, must be intimately involved in the learning process. By analyzing their feedback, studying their performance and observing their behavior during “development” initiatives, the organization can adjust training to make it smarter, more productive and more agent-centric.

A pivotal component of a “learning culture” is an emphasis on continuous practice. By reinforcing vital competencies and encouraging peer-based practice to help agents learn new skills and strengthen existing ones, the organization cultivates agents who are ready for primetime. They will not simply know relevant information or understand key contact center systems; they will feel completely comfortable sharing that information (and making spur-of-the-moment decisions) with customers.



If the goal of practice is to foster agent comfort and empowerment, it must involve more than handling routine, repetitive tasks and issues. It must involve practicing the soft skills that distinguish agents who can engage with customers from those who merely speak to them. The organization must emphasize “training the smile” to an even greater degree than it does “hiring the smile.”

Fundamentally, this concept is nothing new. Sales agents are trained to make human connections so that they can create more value (and close more deals) than a static website. It is time to apply that principle to all facets of the engagement journey.

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By embracing and encouraging continuous learning, organizations can start to develop a practice-driven culture, an environment where every employee is not only always learning, but also engaged in their personal growth, empowered to help others grow by offering constructive feedback, and attaining expertise by continuously honing and expanding their skills,” explains Foote.

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DEVELOPING YOUR LEARNING STRATEGIES: STEPS TO SUCCESS



Nearly 90% of organizations identify agent development as a pivotal contact center priority. The support is essentially as close as the business world ever comes to a consensus.

Far fewer organizations, however, have adopted the aforementioned learning and development mindset. They continue to approach the training process as a finite, disparate or impersonal endeavor. It is about sharing basic information rather than consistently creating more loyal, agile and productive agents.

Some have embraced the proper mindset, but they have not yet plotted a practical course to success. They may know what learning and development should entail at the high level, but they have not operationalized the concept within their actual contact center environment.

Jumpstarting that caliber of action is certainly not easy, especially in a business function notorious for aversion to rapid change. It is, however, quite possible.

Several best practices will transform an appreciation for continuous learning into a robust agent development program.

Build a personalized and adaptive development program

Humans, particularly within a business context, are driven by numbers and results. They often require tangible goals to meaningfully perform.

To create a culture of continuous improvement, it is imperative to provide those goals. Do not simply say the idea is to get better; set clear, observable (if not measurable) objectives for that performance.

With those goals in place, all employees will understand the role they play in the contact center journey. With that knowledge, training leaders can create learning initiatives that help agents fulfill their most important purposes within the organization. They can create personalized roadmaps that provide clear visibility into whether agents are contributing and what specific effort (and training) is needed to increase that contribution.

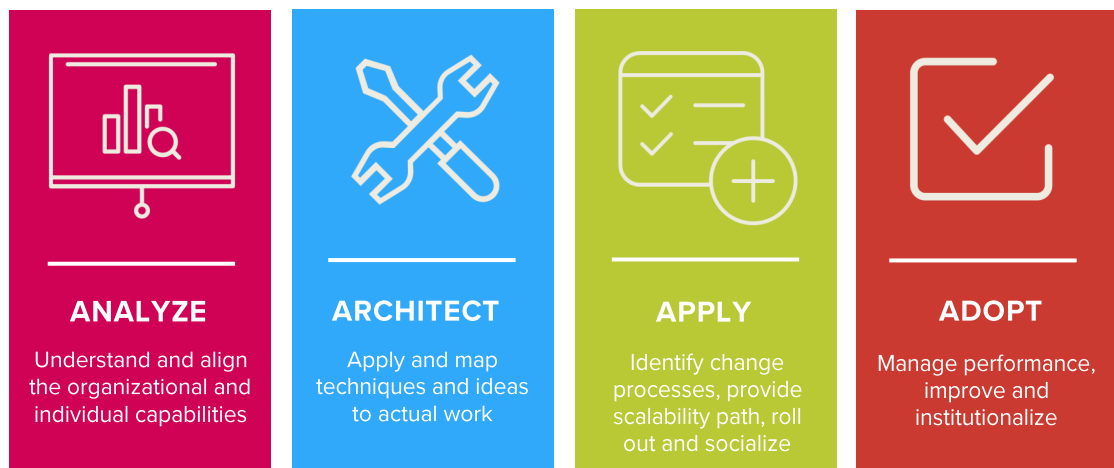
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Although generalized learning programs allow for broader business coverage, leading organizations understand and invest in personalized, adaptive learning programs as they provide targeted opportunities to address skill gaps and pockets of weaknesses within teams,” says Foote. “In order to build crucial competencies in critical functions, such as customer success teams and agents, leadership and executives should drive for more personalized training over standardized learning, especially in the initial stages of transforming or establishing a comprehensive customer experience journey.

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To reinforce this effort, organizations are urged to adhere to what Instructure calls the 4As.



By evaluating individual development through that window, agents will understand what they need to improve and why such improvement matters. Leaders, meanwhile, can effectively calibrate one-on-one coaching. They can also implement opportunities for “practice,” including roleplaying and live call takeovers.

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One of the things that we've done especially this past year is invest heavily in coaching,” says Johnson. “We know that in order for agents to really grow and develop, we've got to coach them. And in order for coaching to be good, it's got to be personalized. We're not coaching all agents on the same development areas, we're coaching them specifically on what they need.

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To help encourage customers to take advantage of the IVR, especially for billing and scheduling requests, call center representatives [from a large utility company] needed to improve their confidence and perfect the verbiage around positioning the IVR,” reveals Foote. “Forty-five representatives from the contact center used Practice to complete several role-play exercises over 30 days. They will begin rolling out exercises for some of their contact center employees in two other locations later this summer as well.

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Leverage real-time analytics to adjust and enhance the learning experience

The best technology does not replace humans; it makes humans more valuable.

Nowhere is that statement truer than within the learning and development space.

By leveraging real-time analytics solutions, organizations can access to insightful data about learning, performance and development. Beyond revealing whether agents are “hitting their numbers,” this degree of insight helps the organization gauge engagement and create data-based strategic plans. The organization knows which agents it needs to better coach or support to ensure they are skilled enough to delight customers and content enough to remain loyal to the organization.

Ultimately, analytics solutions ensure learning and development is a game of precise, targeted science rather than guesswork. Instead of thinking about how it theoretically should be supporting its agents, the organization knows precisely what support they need, as well as how and when to provide it.

As the analytics provide a real-time window into the contact center, the organization can actually make adjustments on the fly. Leaders can install “triggers” for each agent; if they fall below a certain performance threshold or struggle with a certain call, the organization can quickly issue a new training “course,” direct the agent to a section of the knowledgebase or initiate a supervisor takeover. If the issue recurs, leaders know exactly what to discuss in the next training or coaching session.

To take advantage of this opportunity, organizations will need an intuitive learning management system that empowers leaders to quickly develop (and agents to readily access) new training material.



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Instead of hearing, ‘we can’t get to the training,’ the feedback is more about the content,” says Heidi Bynum of Bluegrass Cellular, which recently implemented the Bridge LMS. “It’s allowed us to realign everything we’re doing to drive better performance, which no doubt contributes to a better customer experience.

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Emphasize continuous, collaborative learning

While real-time analytics solutions help leaders understand learning and development needs, they cannot fully capture the agent experience. They may not reveal how the agent feels in all scenarios, how best to correct a problem through training or how to translate classroom knowledge into real-world performance.

That information is, however, fully available. It lies with the agents.

As the employees actually working on the frontline, agents have a direct window into the efficacy of the experience. They understand how what they are *supposed* to do actually impacts customers. Based on their experiences, they develop useful feedback about processes and systems. They also create “on the job shortcuts” for solving particular issues.

Beyond that insight, they also hold the key to a particularly relevant piece of intelligence: how *they* feel about the contact center environment.

Collectively, this information can improve agent engagement strategies, refine training, drive new “best practices,” optimize processes and overhaul performance management initiatives. It is therefore imperative to leverage agent feedback.

To do so, the organization must create an opening feedback channel for agents to share issues with the overall customer experience. It can pair top-performing agents with agents who are struggling with certain skills and incentivize—rather than discourage—agents from collaborating during customer interactions.

By making all group training sessions interactive, the organization also unlocks the “agent perspective” for putting the learning to work. When these agents voice their concerns or deliver “insider tips,” the entire customer experience benefits!

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We definitely have ongoing engagement feedback from the agent,” reveals Johnson. “From a training perspective, at the end of the learning, they’re giving us feedback on how the trainer did. We’re also getting feedback from the supervisor on how they’re performing on the job, based on what we were actually supposed to train them on. Agents also do a self-assessment, and those become part of their action and growth plan for their ongoing development.

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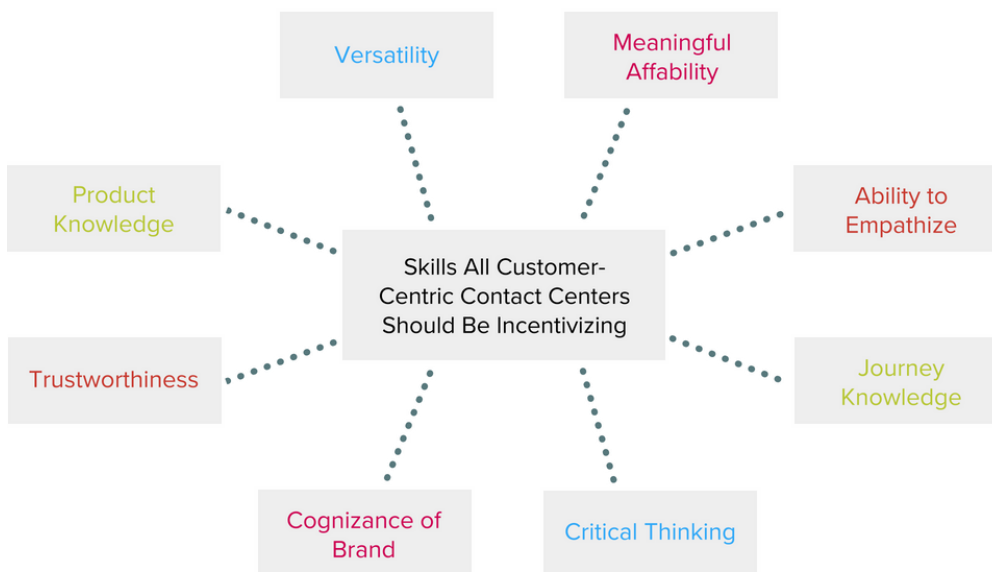
Incentivize skill development

To foster engagement and strengthen learning and development, the organization must express how each individual agent’s effort contributes to the overall business. It must provide agents with a sense of why.

That big picture sense of purpose is not, however, the only requisite step for motivating performance. In order to unlock ambitions and best behaviors from each agent, the organization must establish incentives.

To clarify, it must establish the *right* incentives.

Performance-based incentives should be tied to metrics and results that actually matter to the business. This, specifically, involves incentivizing customer centricity rather than memorizing scripts.



In addition to driving the optimal performance on the frontline, this type of incentive program helps to calibrate training. Leaders and agents know which skills and forms of knowledge actually matter, ensuring training comes across as a form of empowerment rather than an undesirable obligation. And insofar as agents will obviously want to accumulate more incentives over time, this automatically contributes to a culture of continuous improvement.

Further incentivization efforts should include leveraging gamification to drive skill development and offering agents the ability to “train” for career advancement. By offering “management training” for agents who want to earn a bigger role within the contact center and cross-training for those who want to move into another part of the business, the organization will drive agent development while cultivating more loyalty.

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We want them to be the best that they can at their job, but we also want them to grow,” notes Johnson. “A lot of the internal growth comes in the form of a promotion. [To prepare them for advancement], we work with them to grow some of their soft skills and some of their leadership skills.

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THE COMPETITION WON'T END; NEITHER CAN YOUR LEARNING



New competitors are consistently emerging. Existing competitors are consistently working to improve. Both have their sights firmly set on your existing and prospective customers.

Those customers, it should be noted, are consistently refining (and increasing) their standard for customer engagement. As they interact with the Disneys and Amazons of the world, they expect all organizations to demonstrate the same degree of magic and same passion for customer centricity.

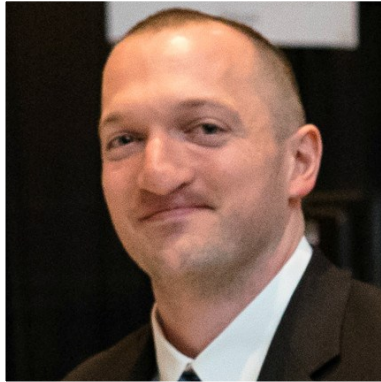
Collectively, these factors ensure the bar for customer experience excellence continues to rise. Do not be shy about celebrating great CSAT and NPS scores, but be very mindful that those scores will be fleeting if you take your foot off the gas. If you relax your commitment to improvement, you might as well directly refer your customers to your competitors.

Since employees are the gateway to a great customer experience, their growth and development are the keys to improvement. If agents do not increasingly become more cognizant of the brand's mission and more capable of meeting customer demands, the organization will be utterly unable to maintain its strong relationships with customers.

Your contact center strategies, processes, technologies and metrics must support this ongoing development. Specifically, you must implement a learning and development program predicated on continuous improvement, personalized roadmaps, one-on-one coaching, open collaboration, real-world practice, soft skill development and intuitive automated retraining. Your program must be measured—and calibrated—based on how it affects the agent experience, the customer experience and the overall health of the business.

Customer centricity is not a one-time transaction; it is a persistent ideology. Agent development cannot be about a few training classes; it must be a persistent organizational commitment.

MEET THE AUTHOR



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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.

Smile by Barracuda from the Noun Project; analyzing by Aneeqe Ahmed from the Noun Project; tools by Loudoun Design Co. from the Noun Project; test by rajakumara from the Noun Project; Check by Sarah from the Noun Project

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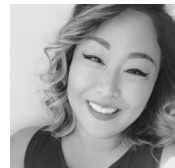
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