



CUSTOMER
CONTACT WEEK
EXECUTIVE EXCHANGE™

AUGUST 11 - 13, 2025 • RADISSON BLU AQUA HOTEL • CHICAGO, IL

WHERE CX STRATEGY LEADS TO EXECUTION.

ONLY AT THE FLAGSHIP CCW EXECUTIVE EXCHANGE



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WELCOME & OVERVIEW

Ready to move from intention to impact? Start here.

The **CCW Executive Exchange** is a high-impact, invite-only experience built for senior leaders who don't have time to waste.

If you've attended CCW Las Vegas, you know the power of this community. But this isn't more of the same. This is your next-level leadership accelerator.

What sets us apart:

✦ **Executive-Only Collaboration**

Join Director-to-C-level peers who are actively shaping the future of customer experience, AI strategy, and operational excellence.

✦ **Insights with Immediate Application**

Our agenda is driven by CMP Research and curated by the CCW Advisory Board. No fluff—just the priorities that matter now.

✦ **Immersive, Real-World Learning**

From Think Tanks to Masterclasses, every session is designed to push your thinking and unlock real solutions.

✦ **Exclusive Research Reveal**

Explore the latest CMP Prism—a agnostic, strategic framework helping CX leaders adopt tech with clarity and purpose.

We don't just talk transformation - we help you lead it.



Nicoletta Karpathios
Deputy Divisional Director, CMP Exchange
Customer Management Practice



THE FLAGSHIP EXPERIENCE



Why Attend

At CCW Executive Exchange, every element is curated to deliver maximum value — through strategic networking, actionable insights, and access to innovative solutions that drive real outcomes. CCW Exchange offers unparalleled access to the brightest minds in customer contact.

**SECURE
YOUR SEAT**



Exclusive Networking

The invitation-only format ensures meaningful peer-to-peer connections with fellow senior leaders. Engage in dynamic conversations, share best practices, and forge partnerships that move the needle.



Focused Group Dialogues

Participate in a selection of Think Tanks, benchmarking discussions, and interactive panels designed to tackle real-world challenges — and uncover strategies you can take back to your organization.



Tailored 1:1 Meetings

Benefit from a personalized meeting itinerary based on your strategic priorities and business goals. Skip the noise and connect directly with solution providers aligned to your needs.



The value that I got from CCW Exchange far exceeded my expectations. Having discussions on current industry challenges and key metrics with presenters and peers was insightful. This was also my first experience with the one-on-one 'speed dating' Exchange format. From this, I gained valuable insights into customer service operations, BPOs, and technologies I'm eager to explore further with vendors to enhance service at eBay."

*- Sr. Director, Customer Service
Technology, **eBay***

WHO WILL YOU BE ATTENDING WITH?

At CCW Executive Exchange, we hand-pick each delegate to ensure an exclusive environment for high-level discussion and strategic insight. Attendees are carefully qualified based on seniority, strategic influence, and budget authority, guaranteeing an elite network of peers driving innovation in CX. Engage in meaningful, outcome-oriented discussions with top CX executives who share your challenges and priorities.

KEY QUALIFICATIONS



Active project requirements with solution needs

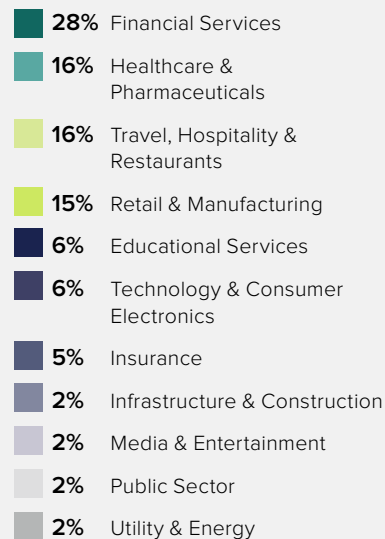
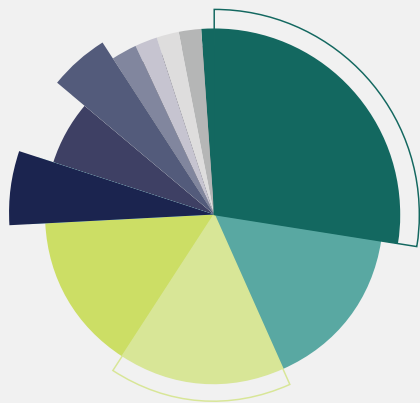


Directly controls or influences budgetary decisions

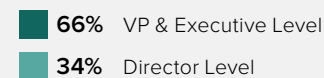


Directly controls or influences CX, customer contact operations strategy

INDUSTRY*



SENIORITY*



JOB TITLES

VPs & Heads of:

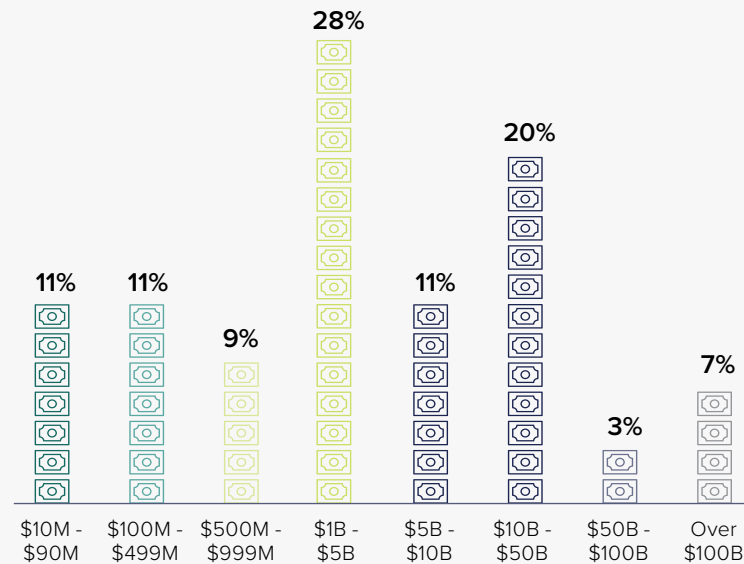
Business Insights
Call & Contact Centers
Client Services
Customer Care & Support
Customer Engagement & Loyalty
Customer Experience (CX)
Customer Operations
Customer Success
Digital Strategy & Innovation
Employee & Agent Engagement
Field & Regional Operations
Fraud & Compliance
Learning, Training & Development
Member Experience
Omnichannel Strategy
Operational Excellence & Transformation
Quality Assurance
Service Delivery
User Experience (UX)
Voice of Customer (VoC)
Workforce Management

**data compiled from 2024 CCW Executive Exchange attendee profiles*

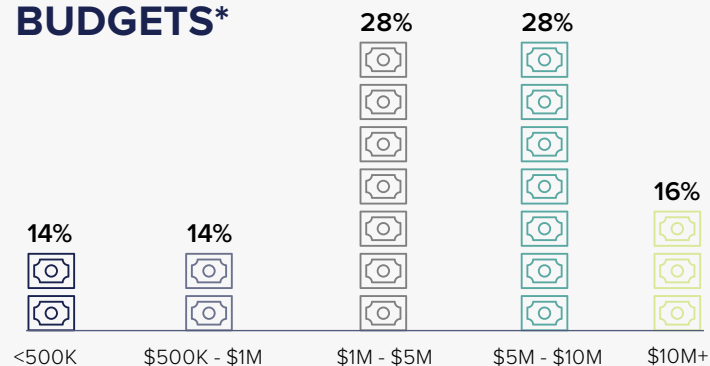
Share insights, benchmark strategies, and uncover actionable solutions tailored to the complex demands of CX leadership.



ANNUAL COMPANY REVENUE

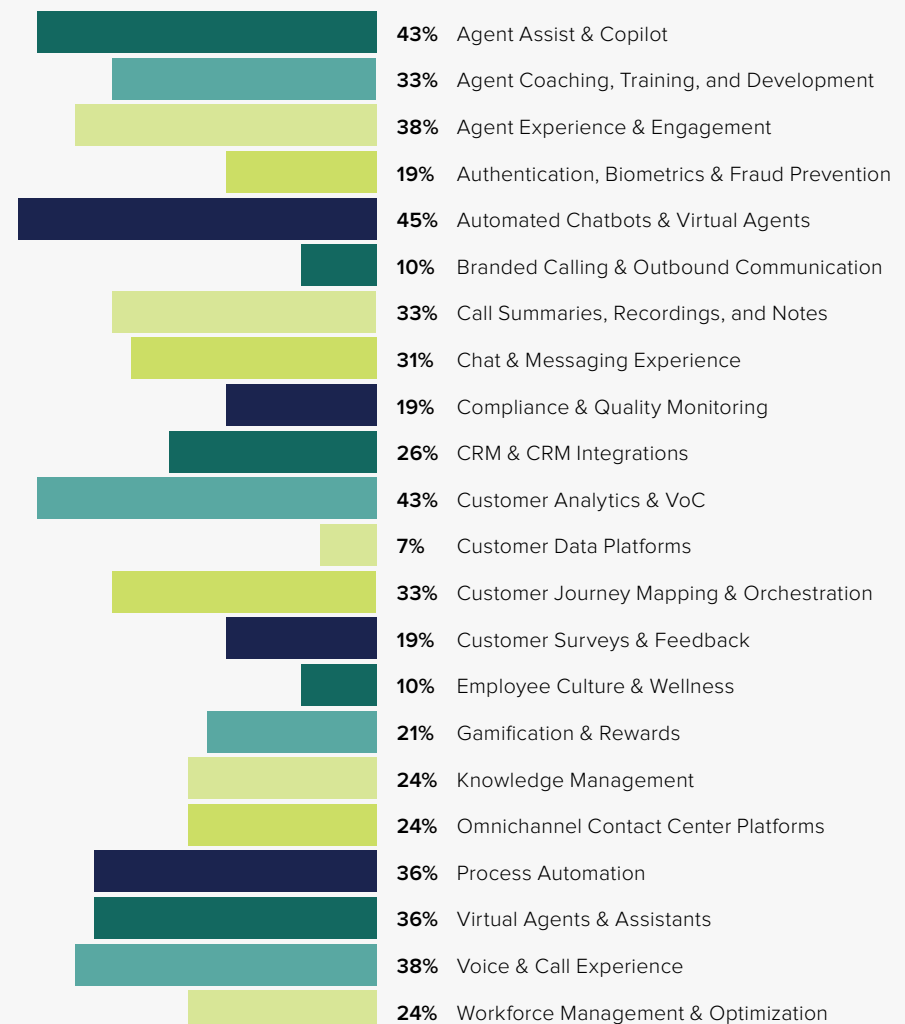


INVESTMENT BUDGETS*



*data compiled from 2024 CCW Executive Exchange attendee profiles

TOP INVESTMENT PRIORITIES IN 2025



PROGRAM THEMES



Lead the Change. Shape the Future of Customer Contact.

At CCW Executive Exchange, explore the strategies, tools, and innovations that top leaders are using to elevate customer experiences in the AI era.



Automate Smarter, Operate Faster.

Reimagine your operating model. Cut out inefficiencies, streamline workflows, and optimize resources — all while staying agile and proving real ROI.



Personalize Every Interaction, Drive Results.

Leave generic CX behind. Use customer intelligence, predictive analytics, and segmentation to deliver experiences that build loyalty, spark engagement, and boost revenue at every touchpoint.



Master Self-Service, Maximize Impact.

Increase adoption, reduce effort. Create seamless self-service experiences and channel strategies that meet today's expectations — so your teams can focus on what matters most.



KEY PRIORITIES FOR 2025–2026

According to CMP Research's 2025–2026 Customer Contact Benchmarking Report, these priorities are shaping the future of customer operations and experience.

Automation & AI-Powered Efficiency



74% of leaders are investing in automation powered by AI to drive efficiency and reduce operational costs.



Over **50%** prioritize AI-driven self-service, including chatbots, intelligent IVRs, and knowledge systems to meet rising customer expectations.

Data-Driven Personalization & Predictive CX

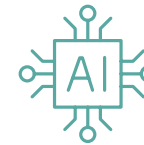


Customer analytics and real-time agent assist tools are critical for delivering personalized, predictive service at scale.



Data activation and GenAI integration are accelerating, but many organizations still face challenges in execution and scalability.

Empowered Teams, Elevated Experiences



Upskilling and employee engagement are essential as agent roles evolve in AI-augmented environments.



Leaders aim to boost self-service adoption while preserving trust and delivering seamless CX.

2025 CCW ADVISORY BOARD



Robert Schoenfield
EVP of Licensing & Partnerships
Krisp



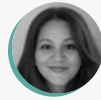
DB Banerjee
VP, Strategic Segment
Observe.AI



Natalie Beckerman
Global Head, Customer Support Operations
IHG Hotels and Resorts



Colleen Beers
Former President, Global Head of Trust & Safety
Alorica



Anastasia Bellos
SVP, Global Market Leader
Alorica



Jaysa Boyer
Head, Employer Engagement
Ultimate Medical Academy



Darnell Brooks
Director, Operations Process and Strategy
The Home Depot



Geoff Burbridge
Managing Vice President, Customer Channels Horizontal Services
CapitalOne



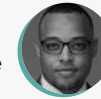
Tyler Carpenter
Customer Service Officer
DC Department of Employment Services



Cheryl China
SVP, Director Retail Servicing
Citizens Bank



Lydia James
Former AVP, Contact Center Operations and Center of Excellence
Cox Automotive



Brandon Darrington
VP for Internal Medicine, Executive Administrator for Clinical Affairs and Administration
Emory Healthcare



Shantanu Das
GM, Global Head of Post Order Customer Experience
Wayfair



Michael DeJager
Managing Director, Events
Customer Management Practice



Shikha Desai
VP, Operations, Student Resources
UnitedHealthcare



Wes Dudley
VP, Customer Experience
Broad River Retail



Lance Gruner
Former EVP, Global Customer Care
Mastercard



Niki Hall
Chief Marketing Officer
Five9



Jennifer Harrington
VP Marketing, Demand Generation
Genesys



Shep Hyken
Chief Amazement Officer
Shepard Presentations, LLC



Mark Killick
SVP, Experiential Operations
Shipt



Mario Matulich
President
Customer Management Practice



Adam McCreery
Director, CX
DraftKings, Inc.



Sean Minter
Founder and CEO
AmplifAI



Sam Nader
Senior Director, Financial Products Service Centers
Target



Thomas Nusspickel
Former Chief Operating Officer
American First Finance



Anne Palmerine
VP, Customer Engagement and Enrollment Services
UPMC Health Plan



Ricardo Parodi
VP, Customer Experience
Marriott



Amy Payne
VP, Global Customer, Partner & Events Marketing
Talkdesk



Deana Perrin
Former Senior Director, Customer Experience
Blue Shield of California



Becky Ploeger
Global Head of Reservations & Customer Care
Hilton



Troy Shaffer
VP, Contact Center Operations
SCAN Health Plan



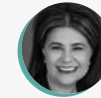
Gadi Shamia
CEO
Replicant



Mariano Tan
President & CEO
Prosodica



Vince Trotter
VP of Client Success
National Debt Relief



Monica Vasquez
SVP, Director, Truist Care Center
Truist



Karen Vaughn
Senior Director, Consumer Care
Nike



Einat Weiss
CMO
NICE



Ron Zanders
VP, Customer Success Operations
Verizon

MEET OUR INDUSTRY LEADING SPEAKERS SHAPING THE FUTURE OF CX



TRANSFORMATIONAL LEADERSHIP & STRATEGY



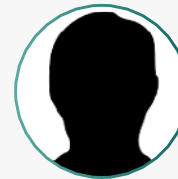
Angie Flury
Chief Call Center Officer
Morgan & Morgan



Todd Unger
Chief Experience Officer
American Medical Association



Mark Killick
Senior Vice President,
Experiential Operations
Shipt



Aaron Davis
Senior Vice President,
Head of Product
Consumer Card
& Lending
Mastercard



Darnell Brooks
Director, Operations
Process & Strategy
The Home Depot



Rasheeda James
Vice President,
Client Services
Americor

AI & ADVANCED ANALYTICS



Inna Larson
Vice President,
Technology
Coopers Hawk Winery & Restaurants



Jack Zhang
eSupport and AI
Transformation Office
Director
Lenovo



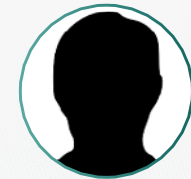
Megan Brown
Director, Global Data
Science Center
of Excellence
Starbucks



Anna Obikane
Executive Director
User Experience
Research
JPMorgan Chase



Vee Vu-McKean
Senior Director,
Strategic Initiatives &
Business Support
Ally Financial



Matthew Partrick
Senior Director,
Analytics
Ally Financial

MEET OUR INDUSTRY LEADING SPEAKERS SHAPING THE FUTURE OF CX



HEALTHCARE & CLINICAL EXCELLENCE



Christine Baumann
Staff Vice President,
Strategic Initiatives &
Digital Transformation
Elevance Health



Jim Economou
Vice President, Patient
Access Contact Centers
Endeavor Health



Heather Johll
Vice President,
Transformation
& Organizational
Readiness
Ascension



Diane Kohler
Senior Director,
Member & Provider
Services
Centene Corporation



Nancy Wright
Senior Director,
Medical Technology
Advanced Services
GE Healthcare

CUSTOMER-CENTRIC INNOVATION



Jackie Counts
Vice President,
Field Operations
Optimum



Zach Greco
Senior Director,
Customer Engagement
Floor & Decor



Erin Nielsen
Vice President,
Customer Strategy
RPM Living



Mansi Mehta
Executive Director,
Customer and Content
Strategy, Rare Diseases
Novartis



Millicent McIntyre
Senior Director, Buyer
Services
IAA



Brent Nelson
Vice President, Virtual
Communication Center
Welby Financial

MEET OUR HEADLINERS



Angie Flury

Chief Call
Center Officer
**MORGAN &
MORGAN**



 Tuesday, August 12

 8:20 AM

Angie leads one of the highest-volume call center operations in the legal industry. Her leadership at Morgan & Morgan is redefining performance, efficiency, and empowerment at scale - blending operational excellence with a people-first mindset.

Todd Unger

Chief Experience
Officer
**AMERICAN
MEDICAL
ASSOCIATION**



 Wednesday, August 13

 8:45 AM

As CXO at the AMA, Todd sits at the intersection of brand, digital, and customer experience. He's known for turning bold ideas into tangible impact - removing friction, aligning teams, and driving customer-centric growth across complex organizations.

WHAT TO EXPECT



FORMAT HIGHLIGHT

Think Tanks That Drive Real Change

Skip the surface-level discussions.

These peer-led conversations go deep into the issues keeping customer leaders up at night. Learn what's working, what's not, and what's next—directly from those who've been there.



SPEAKER HIGHLIGHT

Real-World Strategy from a CX Trailblazer

Join Mark, Monday August 11th for a **bold conversation on reimagining self-service**. Discover when automation works (and when it doesn't), how to uncover hidden costs, and ways to personalize journeys for lasting impact. With global leadership experience and a passion for CX innovation, Mark brings sharp insights you won't want to miss.



Mark Killick
CCW Advisory
Board Member
SVP, Experiential
Operations
Shipt

NETWORKING HIGHLIGHT

Elevated Networking, Chicago Style

We're taking networking beyond the ballroom. From modern Greek dining at Avli on the Park to rooftop vibes at Brickhouse Tavern near Wrigley Field, our offsite receptions offer the perfect mix of atmosphere and access. Whether you're continuing a conversation or making new connections, these curated evenings are designed for meaningful interaction, great food, and genuine moments with fellow senior leaders.



SNAPSHOT AGENDA



Immerse yourself in three days of strategic learning, peer exchange, and high-impact networking.

DAY 1

MONDAY | AUGUST 11, 2025

- 9:00 AM CHECK-IN & REFRESHMENTS
- 9:30 AM ORIENTATION & ICEBREAKER
- 9:50 AM KICK OFF + PANEL
- 11:00 AM THINK TANKS
- 11:45 AM WELCOME LUNCH
- 12:30 PM BUSINESS MEETINGS / TABLE TOPICS
- 2:00 PM QUICKFIRE SPOTLIGHT
- 2:30 PM NETWORKING BREAK
- 3:00 PM BUSINESS MEETINGS / TABLE TOPICS
- 4:30 PM PANEL
- 5:00 PM COMFORT BREAK
- 5:15 PM THINK TANKS
- 6:00 PM OFFSITE RECEPTION

DAY 2

TUESDAY | AUGUST 12, 2025

- 7:30 AM BREAKFAST WORKSHOP
- 8:15 AM CHAIRPERSON'S REMARKS
- 8:20 AM HEADLINER
- 9:00 AM THINK TANKS
- 9:45 AM NETWORKING BREAK
- 10:15 AM BUSINESS MEETINGS / TABLE TOPICS
- 11:45 AM MASTERCLASSES
- 12:15 PM NETWORKING LUNCH
- 1:15 PM THINK TANKS
- 2:00 PM BUSINESS MEETINGS / TABLE TOPICS
- 3:30 PM NETWORKING BREAK
- 3:45 PM MASTERCLASSES
- 4:30 PM CASE STUDY
- 5:00 PM PANEL
- 5:30 PM PRIZE GIVEAWAY
- 5:30 PM OFFSITE RECEPTION

DAY 3

WEDNESDAY | AUGUST 13, 2025

- 8:00 AM CCWOMEN NETWORKING BREAKFAST
- 8:45 AM HEADLINER
- 9:15 AM NETWORKING BREAK
- 9:45 AM BUSINESS MEETINGS / WORKSHOP
- 10:45 AM COMFORT BREAK
- 11:00 AM DEEP DIVE WITH CCW DIGITAL
- 12:00 PM EXCHANGE CONCLUDES

NAVIGATE WITH CLARITY

DAY 1 | MONDAY, AUGUST 11, 2025



9:00 AM | Check-In Opens & Refreshments

Start strong. Grab your badge, settle in, and enjoy fresh coffee and a light breakfast while connecting with fellow leaders as the Exchange kicks off.

9:30 AM | Orientation & Icebreaker

Your personalized experience begins here. Get the inside scoop on how to maximize your agenda—and spark connections with peers before diving into sessions.

9:50 AM | CMP RESEARCH BRIEFING | The Chatbot Reboot: Smarter Self-Service Starts Here

To kick things off, we're relaunching our Chatbot & Virtual Agent Prism, originally unveiled at CCW Las Vegas!

Customer demand for digital and self-service is growing -but customer satisfaction in these channels continues to lag, limiting adoption. Generative and Agentic chatbots offer new promise for improving automated chat experiences, but with a crowded vendor landscape, how do you choose the right solution?

In this session, CMP Research will reveal the results of its latest Prism Analysis—a fit-for-purpose technology assessment framework designed for CX and customer contact leaders. You'll walk away with key takeaways from market trends, analyst evaluations, and user feedback-giving you a clear view of how leading chatbot and virtual agent providers compare.

Then, Mark Killick, SVP of Experiential Operations at Shipt and CCW Advisory Board Member, joins us to unpack what real self-service optimization looks like at scale - from automation strategy to business impact.



Mark Killick
Senior Vice President, Experiential
Operations
Shipt



Jordan Zivoder
Quantitative Research Lead
CMP Research



10:20 AM | PANEL | From Resistance to Resilience: Change Management Strategies that Stick

Organizational transformation doesn't fail because of poor strategy - it fails because people resist the change. In this session, senior leaders share how they've led teams through complex transitions involving new technologies, operating models, and customer engagement strategies. The focus: turning resistance into momentum, and vision into sustained impact.

Learn how to:

- Align cross-functional stakeholders around a shared transformation roadmap
- Build trust and clarity in the face of system and process overhauls
- Translate vision into action through structured communication and enablement
- Move from one-off training to embedded, scalable adoption strategies



Rasheeda James
Vice President,
Client Services
Americor



Christine Baumann
Staff VP, Strategic
Initiatives & Digital
Transformation
Elevance Health



Darnell Brooks
Director, Operations
Process and Strategy
The Home Depot



Moderated by:
Lance Gruner
Former EVP, Global
Customer Care
Mastercard

NAVIGATE WITH CLARITY

DAY 1 | MONDAY, AUGUST 11, 2025



11:00 AM

THINK TANK SESSIONS **A B C**

A Rethink Outsourcing: Strategy, Scale & BPO Partnerships in the Age of Automation

This discussion group explores how global organizations are evolving their outsourcing strategies to align with automation, AI, and changing customer expectations. Learn how to build scalable, value-driven partnerships that drive impact across the enterprise.



Andrew McIlmurray
Global Head of Support Operations
Strategy and Governance
Uber

B Design for Clarity: Empowering Self-Directed Customer Journeys

This discussion group explores how prioritizing self-directed journeys can unlock deeper customer insights, improve channel alignment, and ultimately deliver digital experiences that feel intuitive, human, and trustworthy.



Anna Obikane
Executive Director, User Experience
Research
JPMorgan Chase

C From Value to Loyalty: Rethinking Customer & Associate Experience as One Journey

This discussion group explores building unified loyalty across audiences, why DE&I commitments and culture cannot be "paused," and how to lead your team through change while maintaining trust, performance, and purpose.



Zach Greco
Senior Director, Customer Engagement
Floor & Decor

11:45 AM

WELCOME LUNCH | Let's Dish

A casual, welcoming space to eat, connect, and start dishing on the big ideas shaping CX, digital, and operational strategy.

NAVIGATE WITH CLARITY

DAY 1 | MONDAY, AUGUST 11, 2025



12:30 PM

Business Meetings

Table Topics

2:00PM

QUICKFIRE SPOTLIGHT | 3 Stories, 30 Minutes, Real Results

In this fast-paced, TED-style session, three solution providers each take the stage for a focused 8–10 minute talk.

Each spotlight highlights a real customer experience challenge - and the solution that made a measurable impact. Clear, concise, and results-driven.



Moderated by:

Brian Cantor

Managing Director & Chief Analyst

CCW Digital

2:30 PM

NETWORKING BREAK | When I Dip, You Dip, We Dip

Snack, sip, and recharge. Whether you're team sweet or salty, take a break with crave-worthy dips, quick bites, and great conversation

3:00 PM

Business Meetings

Table Topics

4:30 PM

PANEL | More Than Machines: Elevate CX with AI and Empathy

Winning CX today requires more than tech - it demands a seamless blend of AI innovation and genuine human empathy. This panel explores real-world insights on empowering teams, using predictive intelligence effectively, and creating connected customer journeys that feel effortless and authentic.

- Humanizing automation: Using AI to enhance [not replace] the human connection
- Empowering the front line: Intuitive tools and real-time insights for better outcomes
- Practical innovation: Cutting through tech hype to deliver real customer value
- Breaking silos: Aligning data and strategy for frictionless CX



Erin Nielsen

Vice President of
Customer Strategy

RPM Living



Nate Erisman

Director, Customer
Support

Scout Motors



Moderated by:

Audrey Steeves

Content Analyst

Customer

Management Practice

Sponsored by



5:00 PM

Uncork & Unwind Comfort Break

Grab a glass of vino and ease into the final group discussions of the day.

NAVIGATE WITH CLARITY

DAY 1 | MONDAY, AUGUST 11, 2025



5:15 PM

EVENING THINK TANKS **A** **B** **C** SIP, SAVOR, STRATEGIZE

A Recovery as Retention: Winning Loyalty Through Service Excellence

A well-handled issue can build more loyalty than a flawless journey. Explore how to use AI, proactive outreach, and agent training to turn problems into growth.

- Predict and prevent service failures.
- Train agents for high-sentiment conversations.
- Engage proactively to reduce churn.

B Personalization vs. Privacy: Strike the Right Balance for CX Success

Hyper-personalized CX can drive growth—but only if it's rooted in trust. Explore how to use AI and data to create relevant, real-time experiences while respecting privacy and staying compliant.

- Deliver personalization that feels valuable, not invasive.
- Build transparency and control into every customer touchpoint.
- Balance innovation with regulation to reduce risk and strengthen loyalty.

C Inside the Black Box: Fix Fragmented Systems Before They Fail CX

Every CX leader is investing in digital tools - but when systems don't talk to each other, CX suffers. We'll unpack the hidden cost of disconnected tech stacks, siloed data, and duct-taped workflows - and explore how leading organizations are eliminating friction at the source.

- Identify where fragmentation is quietly damaging CX and operational performance
- Learn how to prioritize integrations that unlock speed, accuracy, and efficiency
- Discover how leading brands are building cohesion across platforms, teams, and data flows

6:00 PM

Offsite Reception at Avli on the Park

Unwind and connect with fellow attendees at our exclusive offsite reception at Avli on the Park, a modern Greek dining experience in the heart of Chicago. Enjoy an evening of elevated bites, refreshing cocktails, and meaningful conversations in a vibrant, upscale setting.

Whether you're continuing a conversation from earlier in the day or forging new connections, this is the perfect atmosphere to relax, recharge, and expand your network.



INNOVATE WITH IMPACT

DAY 2 | TUESDAY, AUGUST 12, 2025



7:30 AM

BREAKFAST WORKSHOP | Welcome to Dunder Mifflin: Is Your LMS “Reddy” for Primetime?

Outdated training tools are failing modern customer service agents—leaving them underprepared, under-coached, and overwhelmed. In this interactive breakfast workshop, Reddy.io invites you to step into the shoes of a newly hired agent navigating legacy onboarding and the daily grind of frontline support. Through hands-on simulation, reflection, and role-play, you’ll uncover the gaps in traditional enablement and see why it’s time to get your LMS truly “Reddy” for your agents.

Key Takeaways:

- Experience firsthand the cracks in conventional onboarding methods
- Identify friction points in your enablement journey through engaging group exercises
- Discover how real-time learning, coaching, and post-call feedback create empowered, high-performing teams

Reddy

8:15 AM

Chairperson’s Remarks

8:20 AM

HEADLINER | Details coming soon!



INNOVATE WITH IMPACT

DAY 2 | TUESDAY, AUGUST 12, 2025



9:00 AM

THINK TANK SESSIONS **A B C**

A Metrics That Matter: Focus on What Moves the Needle

Data isn't the challenge - action is. This discussion group explores how to cut through the noise and use customer intelligence to drive meaningful outcomes. Discover how to segment strategically, validate with testing, and align teams around data that delivers.



Megan Brown
Director of Global Data Science Center of Excellence
Starbucks

B AI with a Conscience: Designing Human-First Customer Journeys

As AI becomes more embedded in customer experiences, the challenge isn't just about what we automate - but how and why. This discussion will explore how to balance efficiency with empathy, embed ethical guardrails from the start, address risks like bias and over-personalization, and design authentic, human-first moments within tech-driven journeys.



Mansi Mehta
Executive Director, Customer and Content Strategy, Rare Diseases
Novartis

C Zero Week to Hero: Redefining Onboarding for Retention and Performance

Onboarding isn't just a checkbox - it's a catalyst for retention, engagement, and long-term success. This discussion group explores how innovative leaders are transforming new hire experiences in a remote-first world with immersive, human-centered strategies that drive early productivity and lasting loyalty.



Diane Kohler
Senior Director, Member & Provider Services
Centene Corporation

9:45 AM

NETWORKING BREAK | Splurge or Surge? The Choice is Yours.

Treat yourself. Whether you're indulging or fueling up for the next session, enjoy options that satisfy every craving—and spark fresh dialogue.

10:15 AM

Business Meetings

Table Topics

INNOVATE WITH IMPACT

DAY 2 | TUESDAY, AUGUST 12, 2025



11:45 AM

MASTERCLASS SESSIONS **A** **B**

A Customer-First AI: Aligning Automation with Empowerment

AI should simplify, not sideline. Discover how to design intelligent systems that give customers more control, not less — delivering frictionless, personalized experiences that feel human, not robotic.

- Build AI that adapts to customer preferences in real time.
- Leverage sentiment to respond faster, smarter, and more intuitively.
- Use automation to empower, engage, and earn long-term trust.

B Empathy at Scale: Blending Automation with Human Touch

AI can supercharge CX — but only if it feels personal. Explore how top organizations are using automation to elevate, not replace, the human connection. From smart workflows to empowered agents, learn how to scale with empathy.

- Blend AI and human-centered design for seamless service.
- Upskill your team to thrive in an AI-augmented world.
- Deliver consistent, high-impact CX through hybrid engagement models.

12:15 PM

NETWORKING LUNCH Mediterranean Midday

Take a flavorful journey and connect over bold Mediterranean bites, fresh ingredients, and invigorating conversation.

1:15 PM

AFTERNOON THINK TANKS **A** **B** COFFEE, CANNOLI & CONNECTION

A Loyalty in the Balance: Turning Service Failures into Brand Wins

A flawless journey isn't the only path to loyalty. In fact, a well-resolved issue can often create stronger customer ties than no issue at all. In this discussion group, explore how leading brands are flipping friction into opportunity—leveraging AI, analytics, and empowered agents to recover with precision and retain with impact.

B Outsourcing: Table Stakes or Priority in a Changing Landscape?

Outsourcing has evolved beyond cost-cutting—it's now a lever for scale, agility, and innovation. This discussion group explores how leaders are reassessing outsourcing strategies amid shifting labor markets, automation trends, gimmicky I'll rising customer expectations. Discover how to build partnerships that add value, not just capacity.

INNOVATE WITH IMPACT

DAY 2 | TUESDAY, AUGUST 12, 2025



2:00 PM	Business Meetings	Table Topics
3:30 PM	NETWORKING BREAK: Blaze Your Snack Trail Choose your adventure. Pick from savory or sweet bites designed for on-the-go networking as you explore new perspectives and fresh connections.	
3:45 PM	MASTERCLASS SESSIONS A B	
	A Future-Ready Teams: Driving ROI Through Workforce Innovation As AI takes on routine tasks, your people are your differentiators. This session explores how to engage, upskill, and retain high-performing teams equipped to navigate complex customer needs and deliver exceptional outcomes in an AI-enhanced world. <ul style="list-style-type: none">• Activate VoE insights to boost engagement, reduce attrition, and fuel performance.• Build agile learning paths for evolving agent roles and specialized skillsets.• Measure workforce impact through retention, CSAT, and revenue-linked KPIs.	B From Service to Strategy: Transform CX Insights into Growth Customer interactions are rich with insights—if you know how to harness them. Learn how to elevate CX from a support function to a strategic growth driver by operationalizing data, improving trust, and delivering personalized, loyalty-building experiences. <ul style="list-style-type: none">• Operationalize customer intelligence to guide strategic business decisions.• Use CX as a differentiator to enhance brand loyalty and market positioning.• Increase customer lifetime value through targeted, data-powered engagement.



I would definitely recommend attending an Exchange. The environment of having senior executives in a smaller setting, brings everyone here for the right reasons and to learn from those outside of what you normally have access to on a day-to-day basis. There's a lot to apply and a lot of technology that you can bring into the contact center. Overall, it's been a great experience."

- Vice President, Contact Center Technology, **Benefytt**



INNOVATE WITH IMPACT

DAY 2 | TUESDAY, AUGUST 12, 2025



4:30 PM **Client Case Study**



5:00 PM **PANEL | AI at Work: Grounded Strategies, Real Business Results**

As AI dominates the headlines, the real work happens behind the scenes—testing, scaling, and iterating. This session brings together leaders who are cutting through the noise and anchoring AI strategy in operational priorities. Learn how they're aligning tools to outcomes, driving adoption across teams, and avoiding the “shiny object” trap.

- How to tie AI initiatives to actual business outcomes (not vanity metrics)
- Building the right internal team and governance model
- Avoiding tech-for-tech's-sake: keeping a sharp eye on value
- Developing realistic timelines for impact
- Supporting human potential, not sidelining it



Jack Zhang
Head of eService
Support & AI
Transformation Office
Lenovo



Jackie Counts
Vice President, Field
Operations
Optimum



Brent Nelson
Vice President, Virtual
Communication Center
Wellby Financial



Moderated by:
Brian Cantor
Principal Analyst
& Managing
Director, Digital
**Customer
Management Practice**

5:30 PM **ENGAGE TO WIN: PRIZE GIVEAWAY!**

Your engagement pays off—literally. Join us as we recognize a winner and hand out exciting prizes to wrap the day on a high note.

6:00 PM

OFFSITE RECEPTION AT BRICKHOUSE TAVERN GAME ON, WIND DOWN

Wrap up Day 2 with a lively night out at Brickhouse Tavern, located right next to the iconic Wrigley Field. This offsite reception brings together great food, cold drinks, and unbeatable rooftop vibes for the perfect mix of networking and unwinding.



ELEVATE LEADERSHIP

DAY 3 | WEDNESDAY, AUGUST 13, 2025



8:00 AM

CCWOMEN PANEL WITH BREAKFAST | How Women Lead, Overcome, and Lift Each Other in Customer Contact

In a world where professional challenges are inevitable, how women support, mentor, and empower one another can make all the difference. Join an inspiring conversation with female leaders who are reshaping the narrative around mentorship, resilience, and collaboration. From embracing vulnerability to standing firm in the face of adversity, our speakers will explore how leaning on collective wisdom, amplifying each other's successes, and navigating difficult situations without ego strengthens not just individual careers but the entire business ecosystem.

Learn how to navigate adversity, build powerful networks, and lead with authenticity in this powerful CCWomen session.



Millicent McIntyre
Senior Director, Buyer Services
IAA



Sandy Ko Fonseca
Founder & Principal
CCWomen



8:45 AM

HEADLINER | Lessons from the CXO Seat: Accelerate Growth Through Experience, Brand & Bold Decisions

In this candid and energizing keynote, Todd Unger, Chief Experience Officer at the American Medical Association—pulls back the curtain on what it really takes to lead experience at scale. Drawing from his latest book and over a decade at the intersection of marketing, CX, and digital transformation, Todd will share the 10 biggest lessons learned in building an award-winning CX practice that drives results.

From eliminating friction and aligning CX with marketing, to harnessing AI to accelerate the “10-second customer journey,” this session will leave leaders rethinking how they show up—for their customers, teams, and organizations.



Todd Unger
Chief Experience Officer
AMA

BONUS:
Stick around for
a special book
signing with Todd
immediately
following the
session!



ELEVATE LEADERSHIP

DAY 3 | WEDNESDAY, AUGUST 13, 2025



9:15 AM | **NETWORKING BREAK + BOOK SIGNING | Twists & Treats**

One last sweet (and salty) send-off! Fuel up with fun snacks and final conversations before heading into the home stretch.

Todd will be signing copies of The 10-Second Customer Journey - The CXO Playbook immediately following his keynote. Don't miss this chance to connect, grab a signed copy, and keep the inspiration going!

9:45 AM | **WORKSHOP + BUSINESS MEETINGS**

WORKSHOP | Beyond Transactions: Designing Communities That Inspire Loyalty

CX is no longer just about solving problems - it's about building belonging. Explore how visionary brands are designing customer communities that inspire loyalty, deepen engagement, and deliver value beyond the product.

Key Discussion Points:

- Apply experience design to foster authentic connection.
- Transform service moments into long-term relationships.
- Create brand ecosystems that drive trust, advocacy, and growth.



Nancy Wright
Senior Director, Medical Technology Advanced Services
GE Healthcare

Business Meetings

ELEVATE LEADERSHIP

DAY 3 | WEDNESDAY, AUGUST 13, 2025



11:00 AM

DEEP DIVE WITH CCW DIGITAL | Have We Been Ignoring Our Customers? New Research On What People Actually Want In The Age of Hyper-personalization

Nearly 94% of contact centers are maintaining or increasing AI investments - but are we losing sight of what customers actually want?

New CCW Digital research reveals growing dissatisfaction with long wait times, clunky journeys, and underwhelming digital experiences. This session unpacks what's really driving frustration—and what customers expect from AI, personalization, and human support in 2025.

Featuring exclusive data insights from CCW Digital and real-world insights on what needs to change.



Audrey Steeves
Content Analyst
CCW Digital

12:00 PM

Exchange Concludes



SOLUTIONS HUB



Skip the Vendor Noise—Streamline Your Efforts. Meet the Right Solutions, Tailored to Your Strategic Initiatives.

KEY SOLUTION AREAS



Agent Experience,
Training, and Engagement



Technology
and Automation



Security, Compliance,
and Optimization



Customer Interaction
and Communication



Customer Insights
and Analytics

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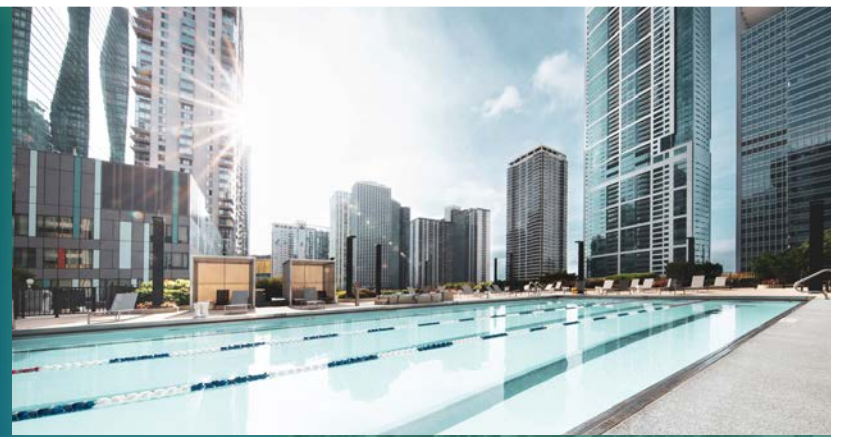
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Group Rate: \$259.00

Cut-off date: Monday, July 21, 2025

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