

CCW

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.

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**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

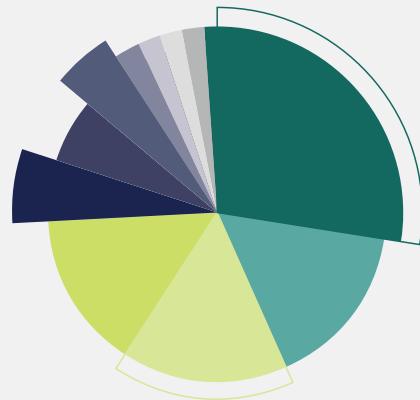


Directly controls or influences budgetary decisions



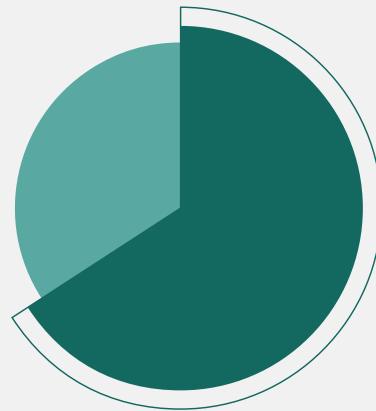
Directly controls or influences CX, customer contact operations strategy

## INDUSTRY\*



28% Financial Services  
16% Healthcare & Pharmaceuticals  
16% Travel, Hospitality & Restaurants  
15% Retail & Manufacturing  
6% Educational Services  
6% Technology & Consumer Electronics  
5% Insurance  
2% Infrastructure & Construction  
2% Media & Entertainment  
2% Public Sector  
2% Utility & Energy

## SENIORITY\*



66% VP & Executive Level  
34% Director Level

## JOB TITLES

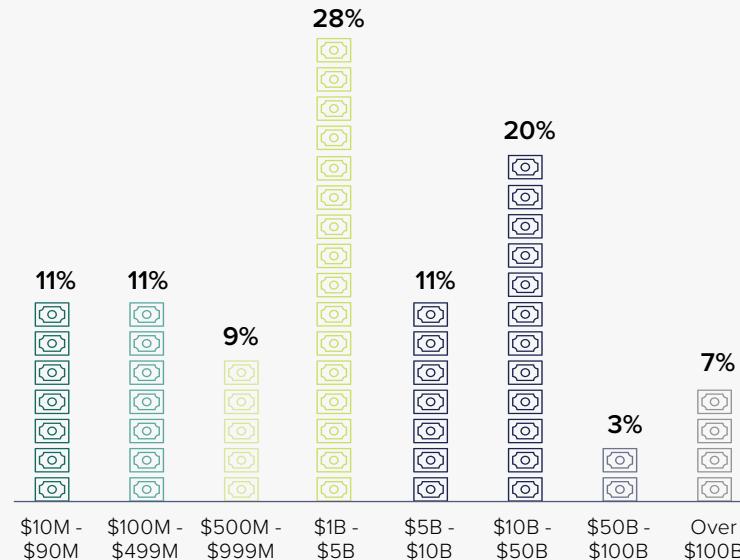
### VPs & Heads of:

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

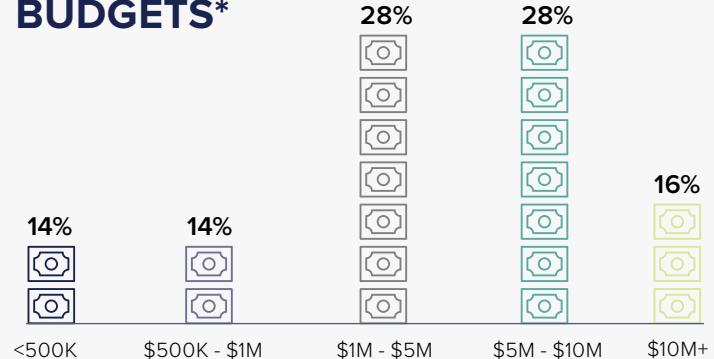
\*data compiled from 2024 CCW Executive Exchange attendee profiles

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

## ANNUAL COMPANY REVENUE

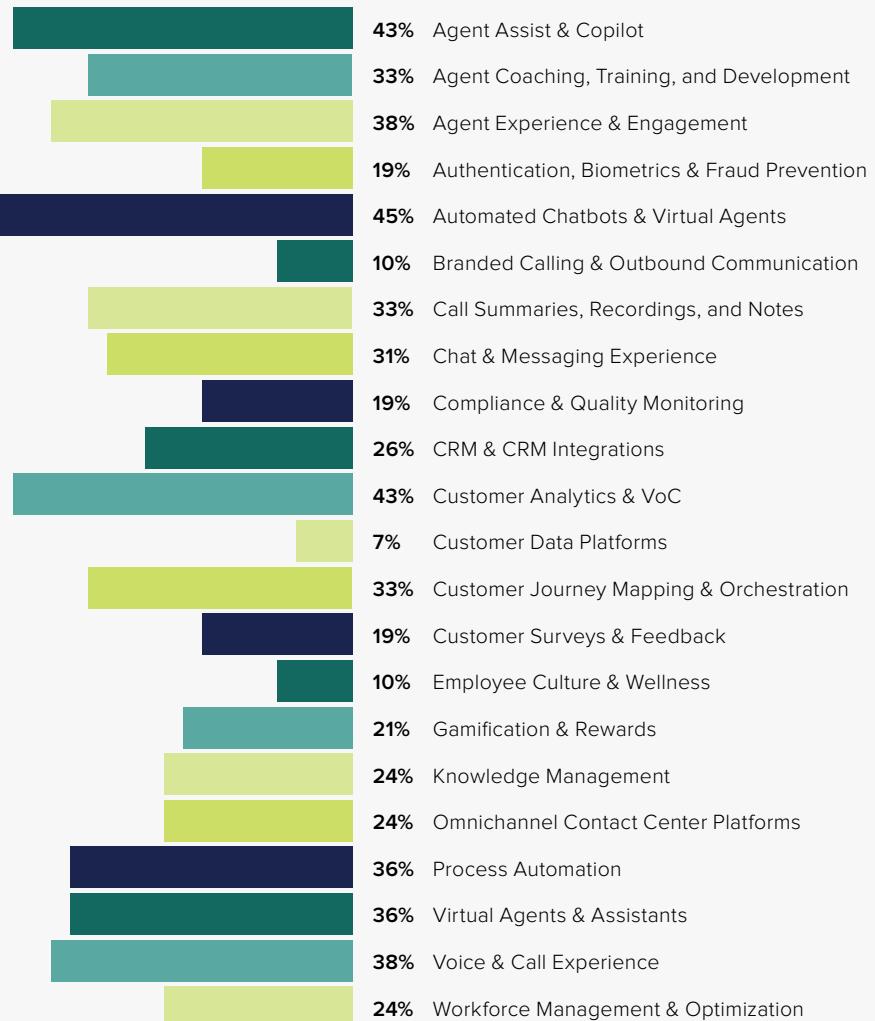


## INVESTMENT BUDGETS\*



\*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.

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# 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

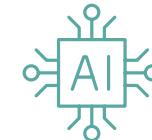


Customer analytics and real-time agent assist tools are critical for delivering personalized, predictive service at scale.



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

|   |  |   |   |
|---|--|---|---|
|  <p>Robert Schoenfeld<br/>EVP of Licensing &amp; Partnerships<br/><b>Krisp</b></p>                   |  <p>DB Banerjee<br/>VP, Strategic Segment<br/><b>Observe.AI</b></p>   |  <p>Natalie Beckerman<br/>Global Head, Customer Support Operations<br/><b>IHG Hotels and Resorts</b></p>         |  <p>Colleen Beers<br/>Former President, Global Head of Trust &amp; Safety<br/><b>Alorica</b></p>   |
|  <p>Anastasia Bellos<br/>SVP, Global Market Leader<br/><b>Alorica</b></p>                            |  <p>Jaysa Boyer<br/>Head, Employer Engagement<br/><b>Ultimate Medical Academy</b></p>                       |  <p>Darnell Brooks<br/>Director, Operations Process and Strategy<br/><b>The Home Depot</b></p>                   |  <p>Geoff Burbridge<br/>Managing Vice President, Customer Channels Horizontal Services<br/><b>CapitalOne</b></p>                                     |
|  <p>Tyler Carpenter<br/>Customer Service Officer<br/><b>DC Department of Employment Services</b></p> |  <p>Cheryl China<br/>SVP, Director Retail Servicing<br/><b>Citizens Bank</b></p>                            |  <p>Lydia James<br/>Former AVP, Contact Center Operations and Center of Excellence<br/><b>Cox Automotive</b></p> |  <p>Brandon Darrington<br/>VP for Internal Medicine, Executive Administrator for Clinical Affairs and Administration<br/><b>Emory Healthcare</b></p> |
|  <p>Shantanu Das<br/>GM, Global Head of Post Order Customer Experience<br/><b>Wayfair</b></p>        |  <p>Michael DeJager<br/>Managing Director, Events<br/><b>Customer Management Practice</b></p>               |  <p>Shikha Desai<br/>VP, Operations, Student Resources<br/><b>UnitedHealthcare</b></p>                           |  <p>Wes Dudley<br/>VP, Customer Experience<br/><b>Broad River Retail</b></p>   |
|  <p>Lance Gruner<br/>Former EVP, Global Customer Care<br/><b>Mastercard</b></p>                      |  <p>Niki Hall<br/>Chief Marketing Officer<br/><b>Five9</b></p>  |  <p>Jennifer Harrington<br/>VP Marketing, Demand Generation<br/><b>Genesys</b></p>                               |  <p>Shep Hyken<br/>Chief Amazement Officer<br/><b>Shepard Presentations, LLC</b></p>   |
|  <p>Mark Killick<br/>SVP, Experiential Operations<br/><b>Shipt</b></p>                               |  <p>Mario Matulich<br/>President<br/><b>Customer Management Practice</b></p>                                |  <p>Adam McCreery<br/>Director, CX<br/><b>DraftKings, Inc.</b></p>   |  <p>Sean Minter<br/>Founder and CEO<br/><b>AmplifAI</b></p>  |
|  <p>Sam Nader<br/>Senior Director, Financial Products Service Centers<br/><b>Target</b></p>         |  <p>Thomas Nusspickel<br/>Former Chief Operating Officer<br/><b>American First Finance</b></p>             |  <p>Anne Palmerine<br/>VP, Customer Engagement and Enrollment Services<br/><b>UPMC Health Plan</b></p>          |  <p>Ricardo Parodi<br/>VP, Customer Experience<br/><b>Marriott</b></p>  |
|  <p>Amy Payne<br/>VP, Global Customer, Partner &amp; Events Marketing<br/><b>Talkdesk</b></p>      |  <p>Deana Perrin<br/>Former Senior Director, Customer Experience<br/><b>Blue Shield of California</b></p> |  <p>Becky Ploeger<br/>Global Head of Reservations &amp; Customer Care<br/><b>Hilton</b></p>                    |  <p>Troy Shaffer<br/>VP, Contact Center Operations<br/><b>SCAN Health Plan</b></p>   |
|  <p>Gadi Shamaia<br/>CEO<br/><b>Replicant</b></p>  |  <p>Mariano Tan<br/>President &amp; CEO<br/><b>Prosodica</b></p>  |  <p>Vince Trotter<br/>VP of Client Success<br/><b>National Debt Relief</b></p>                                 |  <p>Monica Vasquez<br/>SVP, Director, Truist Care Center<br/><b>Truist</b></p>   |
|  <p>Karen Vaughn<br/>Senior Director, Consumer Care<br/><b>Nike</b></p>                            |  <p>Einat Weiss<br/>CMO<br/><b>NICE</b></p>   |  <p>Ron Zanders<br/>VP, Customer Success Operations<br/><b>Verizon</b></p>                                     |   |

# 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

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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 McIlmmurray  
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  
**SUPPORT  
SERVICES  
GROUP**  
PEOPLE • TECHNOLOGY • SOLUTIONS

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.

- 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.

- 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

CCW

CUSTOMER  
CONTACT WEEK  
EXECUTIVE EXCHANGE™

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.

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## KEY SOLUTION AREAS



Agent Experience,  
Training, and Engagement



Customer Interaction  
and Communication



Technology  
and Automation



Customer Insights  
and Analytics



Security, Compliance,  
and Optimization

**LEARN MORE**

# JOIN US IN CHICAGO: VENUE & ACCOMMODATION

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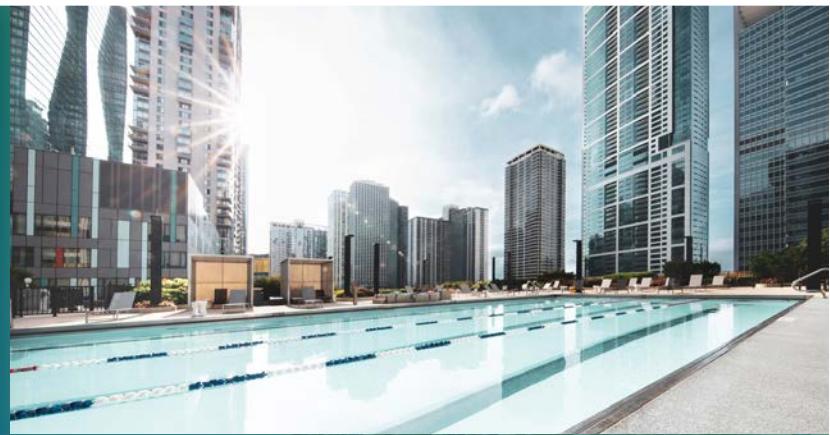
Nestled in the heart of downtown Chicago, the Radisson Blu Aqua Hotel offers a stunning blend of modern elegance and urban charm. This architecturally iconic venue provides breathtaking skyline and lakefront views, state-of-the-art amenities, and sophisticated event spaces. Located just steps from Millennium Park, the Magnificent Mile, and the Chicago Riverwalk, guests can immerse themselves in the city's vibrant culture, renowned dining scene, and rich history.

**Group Rate:** \$259.00

**Cut-off date:** Monday, July 21, 2025

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