



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

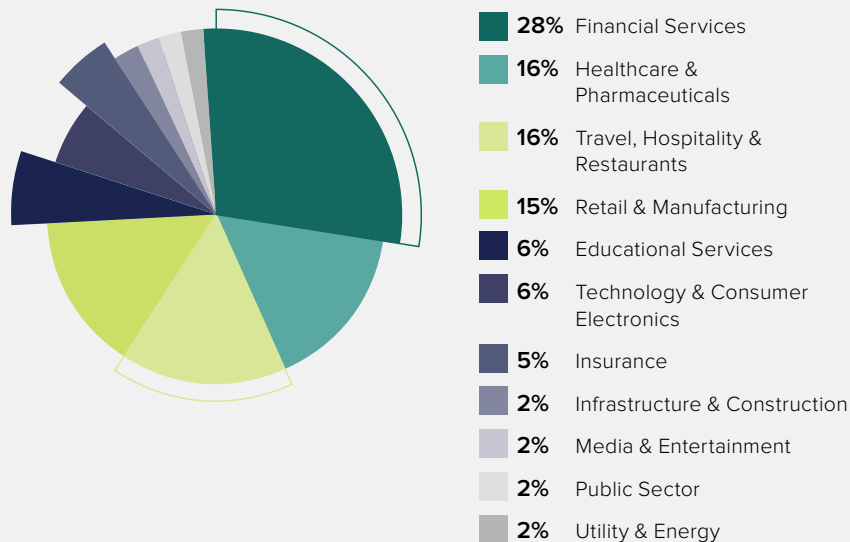


Directly controls or influences budgetary decisions

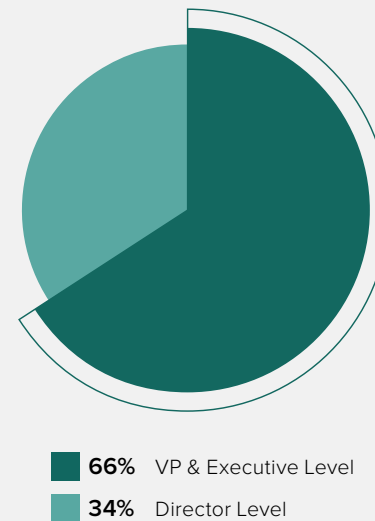


Directly controls or influences CX, customer contact operations strategy

## 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

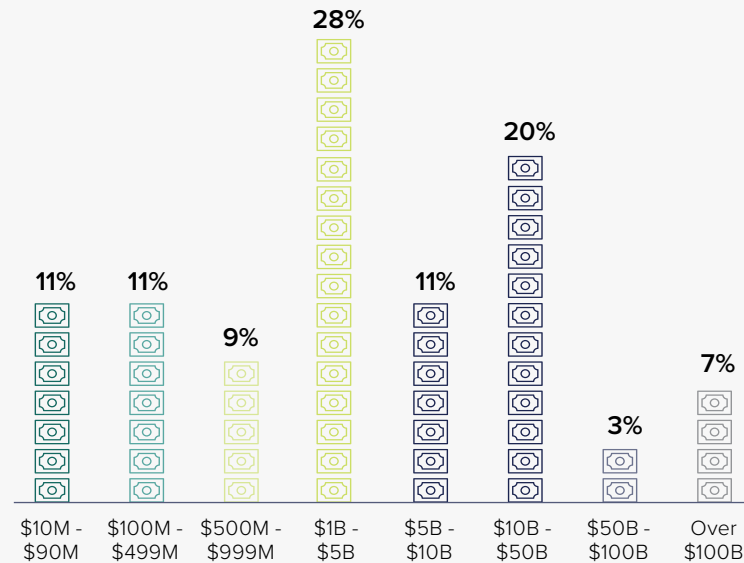
*\*data compiled from 2024 CCW Executive Exchange attendee profiles*



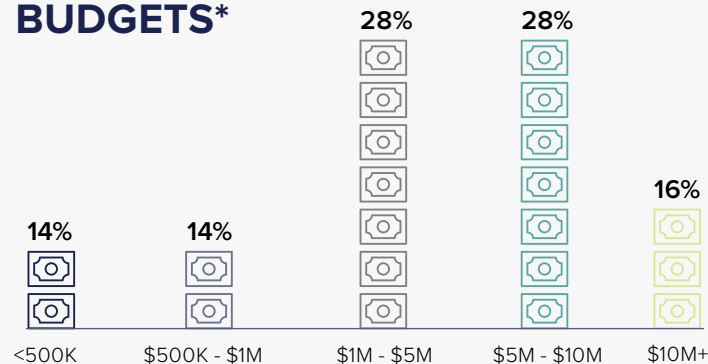
Share insights, benchmark strategies, and uncover actionable solutions tailored to the complex demands of CX leadership.



## ANNUAL COMPANY REVENUE

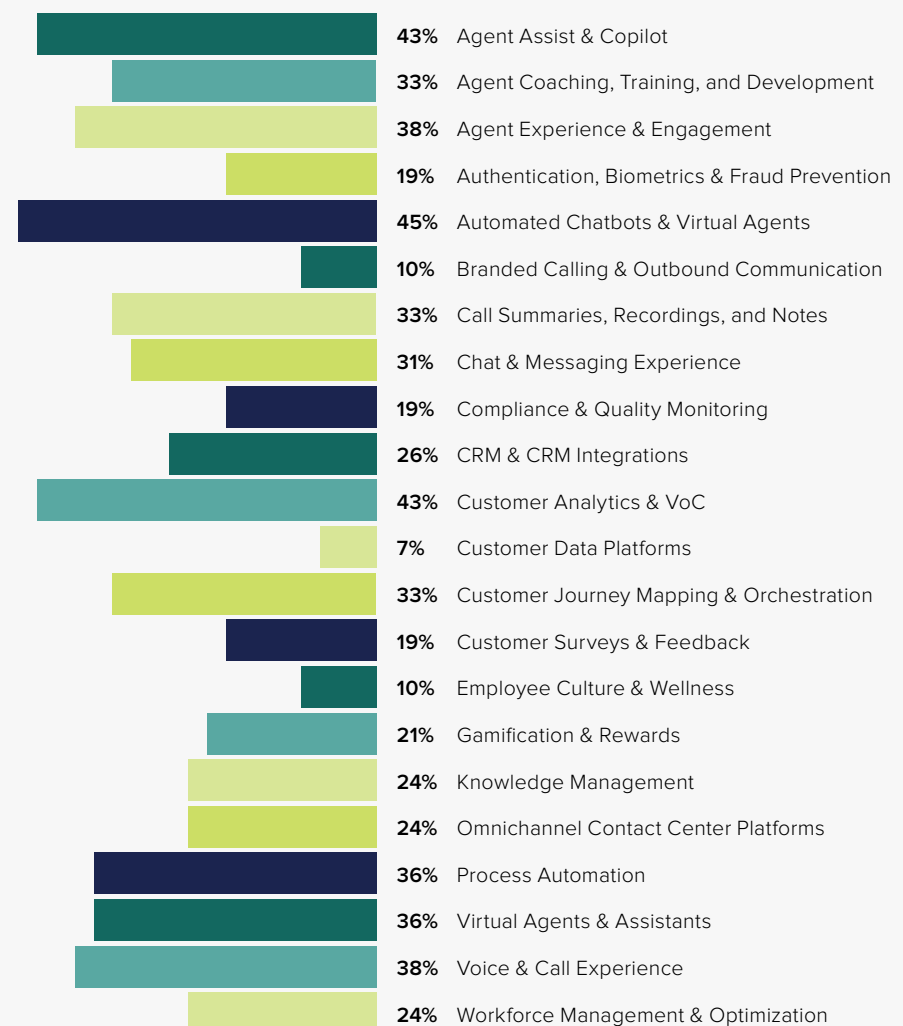


## INVESTMENT BUDGETS\*



\*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

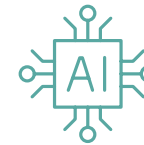


Customer analytics and real-time agent assist tools are critical for delivering personalized, predictive service at scale.



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**



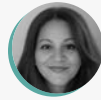
DB Banerjee  
VP, Strategic Segment  
**Observe.AI**



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**



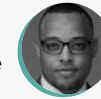
Tyler Carpenter  
Customer Service Officer  
**DC Department of Employment Services**



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



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**



Erik Abel, PharmD, MBA  
Vice President, Clinical  
Strategy & Innovation  
**Caption Care**



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

## CUSTOMER-CENTRIC INNOVATION



Zach Greco  
Senior Director,  
Customer Engagement  
**Floor & Decor**



Erin Nielsen  
Vice President,  
Customer Strategy  
**RPM Living**



Millicent McIntyre  
Senior Director, Buyer  
Services  
**IAA**



Brent Nelson  
Vice President, Virtual  
Communication Center  
**Wellby Financial**



Sierra Capone  
Director, Wellbeing and  
Employee Experience  
**McCormick &  
Company**



# MEET OUR HEADLINERS



## Angie Flury

Chief Call  
Center Officer  
**MORGAN &  
MORGAN**



Tuesday, August 12



8:20 AM



Future-Ready, For The People

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



Lessons From The CXO Seat

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
- 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.

## 9:45 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!

This agnostic analysis provides CX leaders with a clear, fit-for-purpose framework to evaluate chatbot vendors based on product capabilities, market alignment, and real user feedback.

Then, two executive leaders who've advanced self-service at scale - Mark Killick of Shipt and Aaron Davis of Wells Fargo - join us to explore what real optimization looks like in action. From automation strategy to measurable impact, this conversation will cut through the hype and get real about what's working, what's next, and how to get there.



**Mark Killick**  
Senior Vice President,  
Experiential Operations  
**Shipt**



**Jordan Zivoder**  
Quantitative Research  
Lead  
**CMP Research**



**Aaron Davis**  
Senior Vice President,  
Head of Product Consumer  
Card and Lending  
**Wells Fargo**



## 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**



**Brent Nelson**  
Vice President, Virtual  
Communication Center  
**Wellby Financial**



**Darnell Brooks**  
Director, Operations  
Process and Strategy  
**The Home Depot**



Moderated by:  
**Lance Gruner**  
CCW Advisory Board  
Member



# NAVIGATE WITH CLARITY

DAY 1 | MONDAY, AUGUST 11, 2025



11:00 AM

## THINK TANK SESSIONS **A B C**

### **A** Agent Assist in Action: What's Working, What's Next

Agent Assist tools are gaining momentum - but implementation comes with questions. From intelligent routing to predictive insights, how are organizations rolling out new capabilities, measuring success, and preparing their teams for change?

This think tank explores how to take the first step with confidence-and how to plan for what's next. With new use cases launching in 2025, Ally Financial will share how they're rethinking business planning, workforce readiness, and value measurement to ensure long-term impact.

Discussion Points:

- What use cases are driving the most value?
- How are teams preparing agents for new tools?
- What metrics best tell the story of success?
- How do you prioritize AI business cases with confidence?



**Vee Vu-McKean**  
Chief of Staff, Customer Care & Experience  
**Ally Financial**



**Matthew Partrick**  
Senior Director, Analytics  
**Ally Financial**

### **B** Leadership by Design: Empowering Teams Through Creative Thinking

Today's most effective leaders don't just manage - they inspire, empower, and model the values they want to see in their teams. This session invites leaders to explore how creative metaphors, storytelling, and user-centered philosophies can be powerful tools for driving engagement, performance, and purpose across teams.

Discussion Points:

- Translating design values into leadership behaviors
- Empowering teams through creative thinking and metaphor
- Cultivating clarity, curiosity, and care in high-performance environments
- Leading with empathy, not ego



**Anna Obikane**  
Executive Director, User Experience Research  
**JPMorgan Chase**

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

Today's leading brands are moving beyond siloed strategies - your customer experience, associate experience, and brand identity are no longer separate conversations. In this think tank, Zach Greco will lead a discussion on 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.

Discussion Points:

- How to design customer and associate experiences that reinforce one another and drive shared brand loyalty
- Strategies for sustaining culture, DE&I commitments, and engagement through periods of organizational change
- The role of transparency and trust in leading high-performing teams while evolving experience strategy



**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**



**Jim Economou**  
Vice President, Patient  
Access Contact Centers  
**Endeavor Health**



Moderated by:  
**Audrey Steeves**  
Content Analyst  
**Customer  
Management Practice**



**Nate Erisman**  
Director, Customer  
Support  
**Scout Motors**



**Melissa Johnson**  
EVP, Global Workforce  
**Support Services  
Group**

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** See It, Solve It: How GE Appliances Built a Culture of Accountability with Indisputable Visual Evidence

Most organizations rely on KPIs to measure performance - but what if the metrics you're tracking don't tell the whole truth? In this interactive session, GE Appliances reveals how introducing AI powered screen recording completely transformed their CX operations.

You'll hear how they went from blind performance assumptions to a clear picture of what was really happening - and how that visibility allowed them to resolve hidden team and process issues, reduce time spent managing under-performers, and empower HR with indisputable data.

Key Takeaways:

- Why traditional metrics can be misleading and can't always capture the real problems, or the best people
- How visibility deters misconduct, eliminates plausible deniability, and builds a culture of accountability
- What really happened when GE introduced AI powered screen recording, and why agent backlash never came



**Paul Grubic**  
Director of Operations, Contact Center  
**GE Appliances**



**Jason Gimbel**  
Director of Digital Technology, Contact Center  
**GE Appliances**



### **B** CX 3.0: Smarter AI, Smarter Agents, A Strategic Pairing

Exceptional customer support is a balancing act: it requires the precision and speed of AI, along with the emotional intelligence and creativity of human agents. In this conversation, we'll discuss how to integrate AI's quick information retrieval and predictive power into a seamless operation where agents provide empathy, understanding, and personalized solutions. Attendees will walk away with actionable steps to elevate CX by uniting human-centric support with AI's back-end capabilities.

Action Items:

- Implement AI-Driven FAQs and Scripts: Offload routine questions to AI-generated responses so agents can focus on complex or high-emotion interactions.
- Design Agent-AI Collaboration Playbooks: Outline best practices for when agents should rely on AI input and when they should engage with personal expertise and empathy.
- Provide Real-Time Alert Systems: Use AI to detect sentiment shifts or elevated stress levels, prompting agents to step in with customized care.
- Evaluate Success Through Human Feedback: Gather agent input on AI performance to refine workflows and ensure technology remains a supportive partner and not a hurdle.



**Ian Temprow**  
CCO  
**IA Solutions**



**IA Solutions**  
by IA Call Center

### **C** Humans or AI? You're Asking the Wrong Question

Contact centers are at a turning point. The question isn't whether AI belongs, it's how far it can go. In this interactive Think Tank, we'll explore what it really looks like when AI becomes the first line of response, resolving the majority of interactions while human agents focus on the moments that matter most.

You'll hear how one leading brand is shifting toward a largely autonomous contact center, cutting seasonal hiring, reducing burnout, and improving CX in the process. We'll unpack the operational and cultural shifts required to make AI a core part of the team, not just a side project.

Come ready to challenge assumptions, share what's working (and what isn't), and rethink the roles humans and AI will play in tomorrow's contact center.



**Kara Pickell**  
VP of Training and Development  
**COPS Monitoring**



**Marcus Anderson**  
Account Executive  
**Replicant**



# NAVIGATE WITH CLARITY

DAY 1 | MONDAY, AUGUST 11, 2025



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 end the day on a high note!





# INNOVATE WITH IMPACT

DAY 2 | TUESDAY, AUGUST 12, 2025



7:30 AM

## BREAKFAST WORKSHOP | Welcome to Dunder Mifflin: The Agent Onboarding Experience

Outdated training tools are failing modern customer service agents—leaving them underprepared, under-coached, and overwhelmed. In this interactive breakfast workshop, Reddy 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



Adam Levin  
CEO & Co-Founder  
Reddy

Reddy

8:15 AM

## Chairperson's Remarks

8:20 AM

## HEADLINER | Future-Ready, For The People

At Morgan & Morgan, "For The People" isn't just a slogan - it's a strategy. For Angie Flury, that means leading one of the most high-volume, high-emotion call center operations in the country with a relentless focus on culture, care, and performance.

In this candid keynote, Angie shares how she went from AI skeptic to transformation strategist - using technology to enable empathy, not erase it. From AI-powered QA and real-time agent assist to smart transcription tools, every move has been made to empower her 1,100+ agents, reduce friction, and deliver meaningful results.

With every innovation, the mission remains clear: empower people, reduce friction, and build a future-ready organization grounded in trust.



Angie Flury  
Chief Call Center Officer  
Morgan & Morgan

# 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 session 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.

Discussion Points:

- Best practices for segmentation and real-time personalization.
- Build a culture of experimentation with test-and-learn frameworks.
- Align cross-functional teams to unlock measurable impact.



**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.

Discussion Points:

- Striking the right balance between automation and the human touch
- Ethical guardrails and governance
- Identifying and mitigating risks such as bias, hallucinations, and over-personalization
- Designing authentic, meaningful moments within tech-enabled experiences



**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. Discover 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.

Discussion Points:

- Build onboarding experiences that boost confidence and reduce attrition.
- Train for success in a digital world - no manuals, no guesswork.
- Design meaningful employee touchpoints that foster connection and long-term engagement.



**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** Don't Lose Customers to Bad AI: How to Blend AI and Human Touch

How do you blend AI efficiency with human empathy to build stronger, lasting customer relationships? With the rise of AI, the human element is increasingly a critical differentiator for companies. Join Dialpad to learn how organizations can deliver real-time coaching and context-aware suggestions that empower agents to deliver emotionally resonant, high-value customer interactions.



Sara Jew-Lim  
VP of Product Management  
Dialpad



### **B** Riding the AI Wave: No-Regrets Tactics for Turbulent Times

AI is changing business faster than anything we have encountered in recent memory – perhaps ever. With new capabilities and yet to be realized potential emerging every month or so, how do we make the decision to adopt when the state of the art today might be obsolete tomorrow? It's clear that staying on the sidelines has significant risks but so might jumping in too early or on the wrong trajectory. So, can we identify "no regrets" tactics that will pay off no matter what where AI leads us? What can we do to make short term decisions pay off if we have to change them sooner than planned? And how can we avoid mistakes that can't be easily corrected?



John Parkinson  
Senior Director of Emerging Technologies  
Freeclimb

**FREECLIMB**

12:15 PM

## NETWORKING LUNCH Mediterranean Midday sponsored by Goodcall

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



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



1:15 PM

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

### **A** From FOMO to First Steps: How CX Leaders Are Really Using AI Today

AI is everywhere - powering virtual agents, predictive analytics, quality assurance, and compliance monitoring. But with all the buzz, many CX and contact center leaders feel stuck in FOMO-mode, unsure where to begin or what's actually working in the real world.

Hear unfiltered stories from organizations actively using AI in their operations. We'll unpack what worked, what didn't, and the hurdles they had to overcome.

Expect:

- Real-world examples: from first experiments to measurable ROI
- Hard-won lessons and what leaders wish they had known before launching
- A candid group discussion to share your own wins, challenges, and questions

You'll walk away with clarity, peer insights, and a few solid next steps - not just more buzzwords.



**Luke McNamara**  
Sales Director  
**Trusst AI**



**Dan Arra**  
Strategic Partnerships  
**Trusst AI**



### **B** Accelerating Customer Experience Transformation with AI

Join AWS for an exclusive discussion focused on leveraging AI, and your data, to enhance customer experience (CX) strategies. We'll explore how to implement AI solutions effectively, demonstrate clear ROI, and transform both customer interactions and operational efficiency. The discussion will cover practical approaches to proving business value, data strategies for responsible and reliable AI usage, maintaining enterprise-grade security, and developing proactive customer engagement strategies that create lasting competitive advantages.



**David Putlak**  
Principal WW Specialist - Amazon Connect  
**Amazon Web Services**



**Jeremy Puent**  
Principal WW Specialist - Amazon Connect  
**Amazon Web Services**



### **C** The Next Frontier in CX Intelligence: Turning Every Signal into Action with AI

Customer experience teams are sitting on a goldmine of customer signals—from support tickets to app store reviews to social media—but struggle to unify and act on them at scale. Manual processes, siloed tools, and delayed insights create costly blind spots that impact retention and satisfaction.

In this interactive session, we'll explore how AI is revolutionizing the way CX leaders detect, prioritize, and resolve product quality issues. You'll learn how unifying feedback data with real-time analysis can dramatically reduce time-to-resolution, prevent escalations, and empower cross-functional teams with the right insights at the right time.

Come ready to share: What's slowing down your team's ability to act on feedback today? What does a fully AI-augmented support org look like in your mind?



**Christopher Bryan**  
Director of Product Marketing  
**unitQ**



# 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** Driving CX Transformation with AI: Empowering Employees, Engaging Customers

Join us for a candid fireside chat as John Kariotis from Five9 sits down with Millie McIntyre, Senior Director of Buyer Services/Consumer Support at IAA (Insurance Auto Auctions), to explore how one of the world's leading global marketplaces transformed its customer and employee experience with the power of AI.

In this 30-minute session, Five9 and Millie will discuss IAA's journey from legacy systems and high attrition to a modern, AI-powered contact center. You'll hear how they:

- Reduced agent attrition by 52% by improving the agent experience
- Increased chat and text adoption by 300%
- Balanced automation with human connection to create faster, more personalized CX
- Expect practical insights, honest lessons learned, and a human-first perspective on making AI work, for both customers and the teams who serve them.



**Millicent McIntyre**  
Senior Director, Buyer Services  
**IAA**



**John Kariotis**  
RVP Sales  
**Five9**



### **B** Voice AI Masterclass: Learn the Basics & Build a Voice Agent

AI automation is now the top priority for 74% of CX leaders—and Voice AI is emerging as the most impactful channel for AI deployments. In this 30-minute interactive workshop, you'll learn the fundamentals of Agentic Voice AI and build your own functional voice agent—live—trained on your company's website. Use this voice agent to demonstrate real-world applications and drive internal adoption.

Key Takeaways:

- Voice AI 101: Learn what Agentic Voice AI is and how it's changing the way businesses automate CX to reduce cost, drive revenue and boost CSAT. Understand how automated QA and Evals play a key role in production.
- Build a Prototype: Create a custom voice agent in real time, customized to your company—no technical background needed. It will understand your company's products and enable a key sales process.
- Drive Internal Buy-In: See how a simple prototype can help teams gain momentum and secure budget for broader AI initiatives. Learn how Lenovo used a prototype to super charge their project internally.
- Leave With a Deliverable: Walk away with a proof-of-concept Voice AI demo you can immediately showcase with stakeholders via an easy to share link.

This is a hands-on workshop: laptops suggested, but not required.



**Jack Zhang**  
Head of eService Support & AI Transformation Office  
**Lenovo**



**Ian Dangla**  
AI Product Manager  
**Goodcall**



# INNOVATE WITH IMPACT

DAY 2 | TUESDAY, AUGUST 12, 2025



4:30 PM

## FIRESIDE CHAT | The AI Adoption Paradox: Why Your CX Strategy is Failing - and How to Win

Despite record-breaking investments in AI, customer frustration is still at an all-time high. Bots promise seamless service but deliver deflection failures. Leaders are told to “buy the platform” and watch the magic happen - yet the magic never comes. Why? Because we’re designing for the technology instead of the psychology of the customer.

In this high-impact fireside chat, Akash will dismantle the “turnkey AI” myth and reveal a new philosophy for CX success, built on three pillars: anticipating needs before they’re voiced, embedding your brand’s DNA into every interaction, and treating AI as a guided service—not a stand-alone product. You’ll see real-world examples of how predictive, brand-aligned AI can create experiences so intuitive customers never feel the need to escalate.

You’ll learn how to:

- Identify and fix the hidden disconnect between AI capability and customer adoption.
- Shift from a UI-focused build to a truly customer-first UX.
- Embed empathy, trust, and brand identity directly into your AI’s language and behavior.
- Design AI journeys that maximize resolution rates while minimizing friction.



**Akash Karnik**  
Chief Operations Officer  
**1Point1**



Moderator:  
**Audrey Steeves**  
Content Analyst  
**CCW Digital**



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**



**Inna Larson**  
Vice President, Technology  
**Coopers Hawk Winery & Restaurants**



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



# INNOVATE WITH IMPACT

DAY 2 | TUESDAY, AUGUST 12, 2025



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 Chi-Town experience.



# 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**



**Sierra Capone**  
Director, Wellbeing and Employee Experience  
**McCormick & Company**



**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!



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!

# ELEVATE LEADERSHIP

DAY 3 | WEDNESDAY, AUGUST 13, 2025



9:45 AM	Business Meetings	Table Topics
11:00 AM	<p><b>DEEP DIVE WITH CCW DIGITAL   Have We Been Ignoring Our Customers? New Research On What People Actually Want In The Age of Hyper-personalization</b></p> <p>Nearly 94% of contact centers are maintaining or increasing AI investments - but are we losing sight of what customers actually want?</p> <p>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.</p> <p>Featuring exclusive data insights from CCW Digital and real-world insights on what needs to change.</p> <div><div><p>Audrey Steeves Content Analyst CCW Digital</p></div></div>	
12:00 PM	Exchange Concludes	





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