CCW | CONTACT CENTRE LEADERS EXCHANGE

Delivering Personalized and Efficient Service Through Automated, Data-Driven and Integrated Customer Experiences

- Evening Welcome Reception: 29th October 2018
- 30 – 31 October 2018   • Yarra Valley Lodge, Yarra Valley, VIC

Featuring Insights from:

MLC   ANZ   Telstra   genesis   Spark nz   OPTUS yes   TAL

Featuring Event Partners:

8x8   aspect   ACQUIRE   tsa

Researched & Developed by:

IQPC Exchange
A division of the International Quality & Productivity Center

UNLIKE ANY TRADESHOW OR CONFERENCE

CCW
CONTACT CENTRE
LEADERS EXCHANGE

Dear Colleague,

With digital adoption at an all time high across the business and customer landscape, organizations are bringing Pareto's 80/20 rule to contact centres – By redirecting the bulk of repetitive, low-value add customer enquiries to AI-powered self-service and digital channels, agent effort is re-allocating towards complex customer interactions to build brand value and loyalty.

As the likes of Amazon, Airbnb and Uber rapidly innovate in this space, customer expectations have risen and large organizations must rapidly adopt the digital-first service path or risk losing customers to their nimble, digital pure-play competitors.

Most organizations though are challenged with overcoming siloed customer data, disparate legacy systems & channels and complicated team structures.

With these challenges in mind, the 2nd edition of the Contact Centre Leaders Exchange 2018 creates a VIP, invite-only environment, bringing together 40 senior ANZ customer service leaders to network and learn from like-minded peers.

Expect to see your pressing challenges discussed and access the best-in-class solutions that help you achieve your objective of doing more for your customers with less.

I look forward to meeting you in October,

Vishal Mudda
Production Director
Contact Centre Leaders Exchange 2018

How Does The CC Leaders Exchange Differ from Traditional Conferences?

INVITE-ONLY ATTENDANCE
Participation is strictly limited to 40 senior Customer service executives from leading corporations to facilitate a peer-to-peer level interaction

TWO NIGHTS COMPLIMENTARY ACCOMMODATION
At the Yarra Valley Lodge, VIC

A PERSONALIZED EVENT ITINERARY
Customize your agendas by pre-selecting conference sessions, BrainWeaves™ and one-on-one meetings with solution providers

PRE-SCHEDULED 1:1 BUSINESS MEETINGS
Meet 2-4 leading solution providers in areas determined as priorities for your business in private, prescheduled, 30 minute meetings

IMPROVED FOCUS ON NETWORKING
Through collaborative panels, interactive discussion groups and BrainWeaves™

Attendee Qualifications

1 I am the decision maker for my organization's Contact Centre strategy and technology investment

2 My company's annual revenue is greater than $500 million

3 I have an active requirement for contact centre technology/solutions

4 I have allocated a CAPEX of at least $1 million towards external contact centre technology/solutions

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WHY SHOULD YOU ATTEND THE 2018 EXCHANGE?

You shared your challenges - the leaders have solutions!

How Must I:
Optimize My End-To-End Operations For Effective Deployment Of RPA And AI Solutions?

Ans:
Bendigo & Adelaide Bank's lessons from automating back-office processes and supporting agents with AI-powered customer intelligence

How Can I:
Lift Staff Performance, Morale and Retention?

Ans:
First State Super's gamification and KPI strategy improves staff performance, engagement and retention by blending 'fun' with commercial business outcomes

How Should I:
Structure My Service Team To Reduce Call Transfers And Improve First Time Resolution?

Ans:
Telstra's IT inspired, multi-skilled team structures called 'Swarms' reduce customer handovers and improve first-call resolution

How Do I:
Transition My Customers And Staff To A Digital-First Service Experience?

Ans:
Spark New Zealand's digital-first service model delivering 25% Y-o-Y reduction in contact centre FTE, 25% reduction in voice calls and increased chat-based service delivery from 7% of total customer interactions in 2016 to 28% in 2018

How Can I:
Improve My Service Value Proposition For Customers?

Latitude Financial Services' "Customer Obsession" principles improved NPS by 20 points and is pushing to reaching industry highs of 60+

ATTENDEE QUALIFICATION CRITERA

CCLE is an exclusive invite only event with qualification criteria based on decision making authority and investment horizon. Delegates are assessed on the following criteria as a basis before they are invited to attend:

- Company's annual Revenue is **$1 Billion** or above
- **Personally responsible for approving or writing the business case** for any transformation project
- Active requirement for contact centre solutions within the **next 6-12 months**
- Is **Head/Director/General Manager** of the Contact Centre Department (for the company or the region)

To find out more about our qualification criteria, please contact our **Partnerships Director, Collin Lawrence**, on **+61 2 9229 2443** and **sponsorbranding@iqpc.com.au** now.

> ❝ **Really purposeful about who is invited to the event, appreciate that this is for senior executives and definitely more value adding in terms of time well spent.**
>
> *Senior Vice President, National Client Service Manager, Wells Fargo & Company*

> ❝ **I like this format much better. I could talk to the provider during my time one on one and get the information without having to compete for time.**
>
> *Director, Rolls-Royce*

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THE 2018 SPEAKER PANEL

Grant McBeath
Interim CEO Spark NZ Home, Mobile and Business, **Spark New Zealand**

John Merritt
Head of Customer Care, **EnergyAustralia**

Russell Murphy
Contact Centre Performance and Improvement Manager, **Service NSW**

Craig Mendel
Head of Customer Contact, **TAL**

Mark Baylis
Vice President, Customer Service and Digital Customer Engagement, **Optus**

Campbell Wright
General Manager Contact Centres, **ANZ**

Luke Jamieson
Head of Service Centre, **First State Super**

Amalie White
Head of Customer Interactions, **Sunsuper**

Jenny Squire
General Manager Customer Operations, **Genesis Energy**

Lauren Reid
Head of Insurance Direct Service, **MLC Insurance**

Bridgette Dalzell
Head of Customer Service & Support, ANZ, **Latitude Financial Services**

Fiona Booker
Head of Contact Centre Operations, **Auto & General Insurance**

Claire Johnston
Head of Business Customer Care, **Telstra**

Megan Papadopoulos
Head of Call Connection, **Bendigo & Adelaide Bank**

David Daley
General Manager Member Engagement, **ESSSuper**

RETREAT STYLE FORMAT

All IQPC Exchange venues are carefully selected to maximize the value of the Exchange to our participants. We chose venues that encourage high-level thinking in a relaxed atmosphere to ensure you get the most out of your time away from the office.

Venue: Yarra Valley Lodge
Address: 2 Heritage Avenue Chirnside Park 3116 Victoria
Phone: +61 3 9760 3333
Website: www.yarravalleylodge.com

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WHO ATTENDED THE 2017 CONTACT CENTRE LEADERS EXCHANGE?

JOB TITLES

- Group Contact Centre Capability Lead
- Director Service Delivery
- Head of Contact Centres
- GM Contact Centre
- GM Contact Centre
- Commisioner for the Operational Service Centre's
- Head of Service Centres
- GM Customer Services
- CX Manager
- EM Sales & Service
- Program Director - Omni-Channel
- Head of Corporate Operations
- National Service Excellence Manager
- GM Connect Me, Sales and Service

- Helpline Services Leader
- Head of Insurance - Direct Service
- Head of Contact Centre Operations
- Head of Contact Centres
- GM Customer Experience & Ops
- Contact Centre Operations Manager
- Head of Contact Centres
- Director Digital Services & Transformation
- Head of Customer Service
- Head of St George Banking Group Retail, Customer Contact Centres
- Head of Customer Hub
- National Contact Centre Manager

COMPANY

- AAS
- AFSA
- AHM Health Insurance
- ANZ (NZ)
- ANZ Australia
- ATO
- BNZ
- David Jones
- Deakin University

- GMHBA
- Greater Bank
- iSelect
- Kiwibank
- ME Bank
- Mercer
- MLC
- NIB Health Funds
- RACQ
- Schneider Electric

- Service NSW
- Tabcorp
- Telstra
- Ubank
- Westpac
- Woolworths
- World Vision Australia

What The 2017 Delegates Said About The Exchange

"

I found the whole exchange very beneficial overall from the first gathering on the Monday right through to the last session on the Wednesday. The brainweaves were very informative and beneficial to discuss common issues / initiatives etc. Also the networking with other leaders in similar situations and the vendors was beneficial.

National Service Excellence Manager, Kiwibank

"

The small group was fantastic. It allowed everyone to truly engage and connect. Sessions were at the appropriate level for everyone in the room and relevant to current challenges.
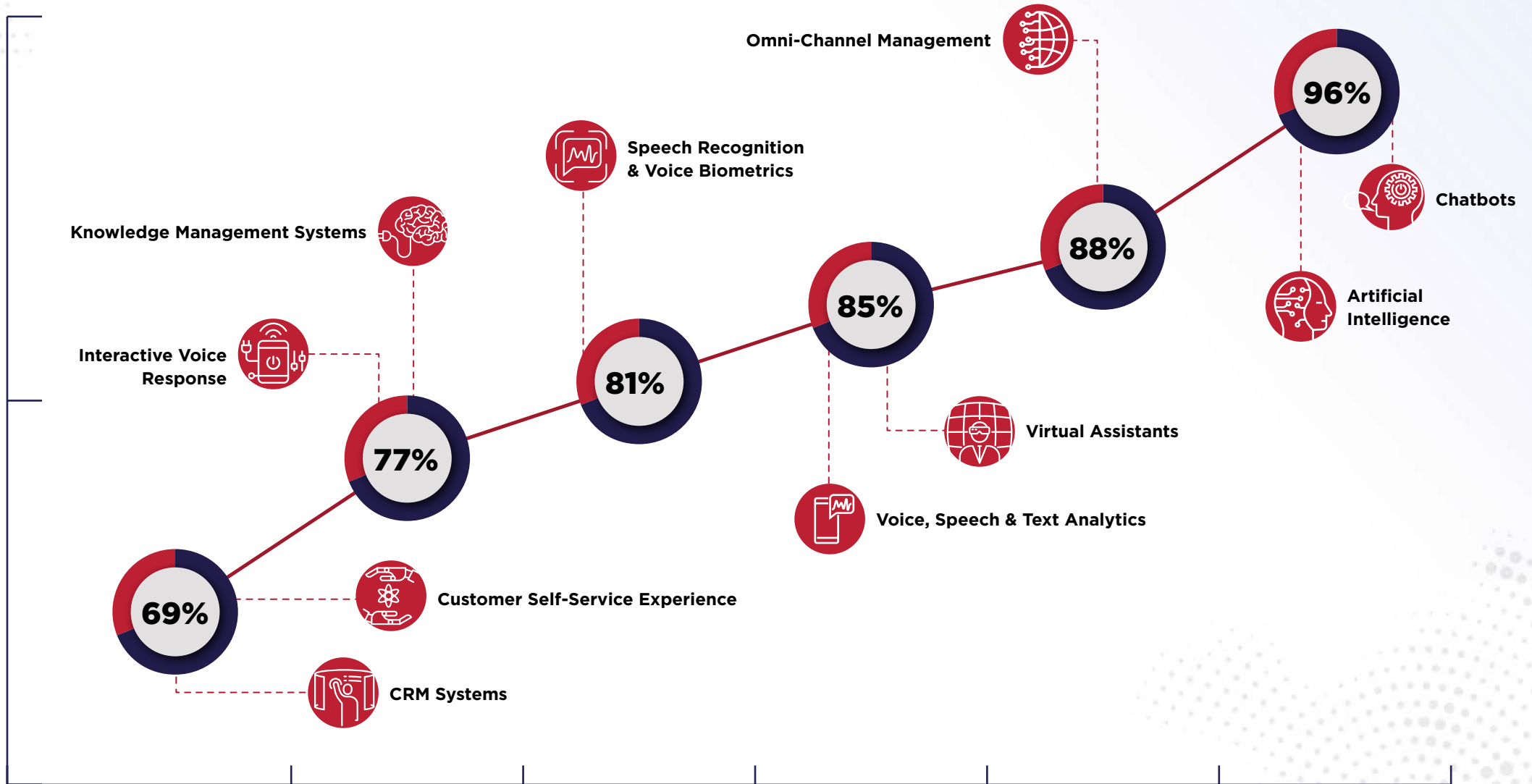
Head of Contact Centres, Tabcorp

"

Venue away from corporate land and perfect amount of participants. Also didn't feel pressure of vendors with sales pitches.

General Manager Customer Experience, Schneider Electric

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WHAT DID THE LEADERS OUTLINE AS INVESTMENT PRIORITIES OVER 2017-2018?

Omni-Channel Management

96%

Speech Recognition & Voice Biometrics

Chatbots

Knowledge Management Systems

88%

Artificial Intelligence

Interactive Voice Response

85%

81%

Virtual Assistants

77%

Voice, Speech & Text Analytics

69%

Customer Self-Service Experience

CRM Systems

Respondents ticked more than one answer

2018 DAY PROGRAM

EXCHANGE DAY ONE: Monday, 29th Oct 2018

17:00 – 20:00	**Registration, Welcome Drinks & Networking Reception**
	Come check-in and meet the other Senior Heads, Directors and General Managers you'll be spending the next 48 hours with. Boost the value of your experience by networking ahead of the main event, accompanied by modern Australian Cuisine and a Drinks reception.

EXCHANGE DAY TWO: Tuesday, 30th Oct 2018

07:45	**Breakfast & Registration**
08:50	**Chairperson's Opening Remarks**
09:00	**Next-Gen Service: Reducing FTE And Improving Customer Experience Through A Digital-First Service Model**

The Goal: Creating a lean, digital-first contact centre model.	**The Solution:** Investing in digital and mobile experiences; Automating low-sentiment, high volume customer interactions through digital and AI-powered capabilities; With the Agile organisation structured, customer journeys are streamlined to remove workload and deliver amazing customer experiences.	**Tools used:** chatbots, virtual assistants, mobile applications, predictive analytics.	**The Results:** 25% Y-o-Y reduction in contact centre FTE; 25% reduction in voice calls; Increase in chat-based service delivery from 7% of total customer interactions in 2016 to 28% in 2018; Virtual assistants and chatbots address 25% of all chat-based customer interactions. He shares insights into this journey around: • Focusing the business on designing out friction in its business processes • Understanding the push and pull levers across customer segments to tailor relevant service experiences and digital adoption • Making data the foundation of service experiences • Implementing outcome based accreditation to rebuild a high performing culture.

Grant McBeath
Interim CEO Spark NZ Home, Mobile and Business,
Spark New Zealand

EXCHANGE DAY TWO: Tuesday, 30th Oct 2018

09:40

PANEL DISCUSSION

Planning For Success: Tailoring An Omni-Channel Service Strategy Driven By The VOC And Data Analytics

Digital tools and channels promise great cost-efficiencies but inadequate planning and change management can subdue the benefits derived. Is our digital experience driving value for the business and customers? Should we offer customers all channels or should we teach them to adopt certain behaviours? Have we got adequate skillsets and resources to deliver on the proposed change? Answering these crucial questions and more, our leaders address how they balance cost efficiency with customer satisfaction through a contact centre strategy:

- Leveraging VOC to integrate contact centre operations into the end-to-end customer journey
- Changes with contact centre leadership and management in a digital-first ecosystem
- Identifying the most relevant channels for your customers through data analytics on customer interactions
- Ensuring adequate resourcing of staff and skillsets for your service requirements

Craig Mendel
Head of Customer Contact,
TAL

Lauren Reid
Head of Insurance Direct Service,
MLC Insurance

10:20 **Morning Tea & Networking Break**

10:40

Room 1	Room 2	
BrainWeave™ - Chatbots And Virtual Assistants 101: Evolving From A Lucrative Concept Into A Successful Value Driver	10:40	**One-to-One Business Meetings**
Jenny Squire General Manager Customer Operations **Genesis Energy**	11:15	**One-to-One Business Meetings**

11:50 **INTERACTIVE ROUNDTABLE DISCUSSIONS**

ROUNDTABLE DISCUSSIONS

Table A	Table B	Table C
How Ready Are Your Channels, Systems And People For Digital Transformation?	**Converting Contact Centres Into Customer Insight Hubs Through Data Analytics**	**Reducing Customer And Agent Effort To Create A Seamless Service And Sales Experience**
Mark Baylis Vice President, Customer Service and Digital Customer Engagement, **Optus**	**Luke Jamieson** Head of Service Centres **First State Super**	**John Merritt** Head of Customer Care, **EnergyAustralia**

EXCHANGE DAY TWO: Tuesday, 30th Oct 2018

	Room 1	Room 2
12:45	**BrainWeave™ - Turning Conversations Into Results With Speech Analytics**	**One-to-One Business Meetings**

13:15	**Lunch & Networking Break**	

	Room 1	Room 2	
14:00	**BrainWeave™ - Getting Your Workflow Management Program Up To Speed For Optimized And Efficient Resourcing**	14:00	**One-to-One Business Meetings**
	Fiona Booker Head of Contact Centre Operations, **Auto & General Insurance**	14:35	**One-to-One Business Meetings**

15:10 **Customer Obsession: How Latitude Financial Services Improved NPS By 20 Points Through Service Principles That Prioritize Customer Outcomes**

While there are a range of technologies and solutions available to improve contact centre operations, deriving greatest value from these investments is down to how strongly an organization understands and prioritizes customer pain-points. At LFS, Bridgette leads a service transformation program through principles that improved NPS by 20 points in a span of 6 months. Setting an ambitious goal of a 60+ NPS, in this case study she shares the principles that enabled this improvement.

• Bringing efficiencies to customer experience through a cloud-first service strategy
• Using customer councils to understand service pain-points and needs
• Tailoring a business and technology investment roadmap that differentiates customer experience and delivers positive outcomes

Bridgette Dalzell
Head of Customer Service & Support, ANZ,
Latitude Financial Services

15:50 **Integrating Customer Channels Through An Omni-Channel Platform To Standardize Service Experience And Improve Resource Productivity**

Over the last 12 months, Sunsuper achieved a remarkable 25% growth in funds under management. This means an increase in customer interaction volumes and the challenge of scaling personalized brand experiences that attributed to this growth in the first place. Addressing these challenges, Amalie shares her journey of transitioning to an omni-channel service platform that has improved handling of customer interactions and unified customer management strategy across contact centre, CX and back-office teams. She will highlight:

EXCHANGE DAY TWO: Tuesday, 30th Oct 2018

- Standardizing and scaling of positive service experiences across channels through centralized channel management
- Improving resource planning and management through cross-channel visibility of customer traffic
- Change management efforts to adapt to a new way of service delivery

Amalie White
Head of Customer Interactions,
Sunsuper

16:30	**Afternoon Tea & Networking Break**

Room 1	Room 2	
16:55 **BrainWeave™ - Deriving Value Out Social Media Integration Into Contact Centres**	16:55	**One-to-One Business Meetings**
	17:30	**One-to-One Business Meetings**

18:05 Improving Service Delivery And Experience Through Automated, Data-Driven Customer Interactions

Last year, Megan Papadopoulos took on the task of transforming Bendigo & Adelaide Bank's contact centres – previously the largest source of complaints within the business. The challenges? Long customer wait times, high call abandonment rates, clunky manual business operations and siloed customer experiences. This case study documents how Megan transformed this environment and improved customer experience through a program underpinned by the Voice of Customer, Operational Excellence, RPA and AI. Elements addressed in this presentation are:

- Improving service delivery by integrating call centre operations into the end-to-end customer journey
- Ensuring success of business process automation by measuring its effect on customer experience
- Leveraging customer intelligence from service touch-points to trigger AI-driven front-end customer interactions
- Personalizing staff coaching and training, using insights derived from voice analytics on calls

Megan Papadopoulos
Head of Call Connection,
Bendigo & Adelaide Bank

18:35	**Networking Cocktails And Dinner**

EXCHANGE DAY THREE: Wednesday, 31st Oct 2018

08:00 **Breakfast & Registration**

08:30 **Chairperson's Opening Remarks**

08:40 **Rethinking KPIs: Improving Customer Centricity And Staff Performance By Gamifying Behavioural Incentives**
Traditional KPIs highlight behaviours of people that fit a certain personality. How can leaders maintain high morale of the larger staff section not in the 'Top Performers' segment? How can they bring the entire workforce to enjoy healthy competition and continuously develop essential skillsets? What do the KPIs of the future contact centre look like? Addressing these questions and more, Luke shares how he created a sustainable culture at First State Super prioritizing fun as strongly as performance.
• Tailoring KPIs incentivizing best practices across all skillsets by focusing on individual strengths and skills development
• Gamifying staff performance through badges and recognition that boosts staff engagement and morale
• Leveraging real-time analytics and performance metrics to tailor personalized improvement/training regimes

Luke Jamieson
Head of Service Centre,
First State Super

09:20 **Cutting Cycle Times And Improving First Time Issue Resolution By Structuring Service Teams Into Agile 'Swarms'**
At Telstra, Claire champions a first-of-its-kind service model in the contact centre industry spanning across 700 agents situated in Australia, India and Philippines.

The Situation: A team structure clubbing resources according to their level of expertise/skillsets.
The Challenge: Low service satisfaction and first-time issue resolution; High call transfers;
The Solution: Inspired by IT team structures, Claire grouped agents into 'swarms' i.e. grouping agents with mixed technical and service expertise, and deployed automation to empower them with right tools and capabilities.
The Results: Lower cycle times and call transfers/escalations, rapid issue resolution and improved cross-channel customer experiences.

This case study documents the 'what', 'how' and 'why' of this transformation, providing insights into results to date and lessons learned form this journey around:
• Implementing 'swarms' i.e. grouping agents with mixed capability sets for rapid resolution of issues ranging across multiple levels of complexity
• Adopting agile principles to constantly iterate and implement new ways of working
• Speeding up agent issue resolution through automated diagnostic support
• Managing change fatigue to ensure project success

Claire Johnston
Head of Business Customer Care,
Telstra

EXCHANGE DAY THREE: Wednesday, 31st Oct 2018

Room 1	Room 2
10:00	
BrainWeave™ - Overcoming Challenges With System Integration And Data Migration Within Your Contact Centres	**One-to-One Business Meetings**

10:35   **Morning Tea & Networking Break**

Room 1	Room 2	
11:00		
BrainWeave™ - Getting The Off-Shore/On-Shore Operations Mix Right	11:00	**One-to-One Business Meetings**
	12:35	**One-to-One Business Meetings**

12:10

<div style="writing-mode: vertical">PANEL DISCUSSION</div>

Agent of The Future: Skill-Sets For Success In A Complex Customer Service Environment

In an automated, digital-first contact-centre, service agents must develop the right skillsets to effectively serve complex customer needs and build brand value.
This session will see leaders share the recruitment policies, performance metrics and skillsets they adopt to enable a productive and competent service team of the future. They share insights into:
- The core competencies of a successful customer service agent of the future
- Attracting the right talent that aligns with and champions the business's CX agenda
- Empowering your staff with the right tools and capabilities to deliver personalized and efficient service
- Managing staff mental health and well-being through training and benefit programs driving a motivated service culture

Campbell Wright	**Craig Mendel**	**Lauren Reid**
General Manager Contact Centres,	Head of Customer Contact,	Head of Insurance Direct Service,
ANZ	**TAL**	**MLC Insurance**

12:50   **Improving Agent Efficiency And Effectiveness Through A Mobile-First And AI-Powered Service Experiences**

Chatbots and virtual assistants are on the radar for most organizations but many stumble with the management of data, workflows and customer journeys to operationalize this potent solution. Moreover, the learning curve for customers and agents to adopt these solutions is a challenge. Addressing these challenges and more, Mark shares his journey from Optus to provide insight into what the future of contact centres would look like in an increasingly automated and digitized environment.
- Developing an omni-channel service experience branching out of the mobile application

EXCHANGE DAY THREE: Wednesday, 31st Oct 2018

- Creating a clear application case and workflow for chatbots and digital layers to blend with your contact centre operations
- Addressing challenges with customer education and engagement to adapt a digital-first service experience that's balanced with appropriate human connections

Mark Baylis
Vice President, Customer Service and Digital Customer Engagement,
Optus

13:30   **Lunch & Networking Break**

Room 1		Room 2	
14:15	**BrainWeave™ - Bringing Agile Principles To Contact Centre Transformation For Rapid Innovation And Iteration**	14:15	**One-to-One Business Meetings**
	Campbell Wright General Manager Contact Centres, **ANZ**	14:50	**One-to-One Business Meetings**

15:25   **Personalizing Customer Service And Reducing Agent Reliance Through A Self-Service Contact Experience**

Service NSW, the front-line for service experiences across multiple government agencies, witnesses a rapid growth in its service portfolio - 2 new customer service offerings are added per week on average and call volumes across its contact centres have increased 25% Y-o-Y. In a bid to balance service costs with scaled personalization, Russell documents his experiences with one of the service lines delivering a world-first, digital driver license to NSW residents, sharing insights around creating a self-service oriented contact centre strategy by:

- Leveraging design thinking principles to tailor the digital experiences that customers easily adopt
- Delivering multiple large scale projects through agile project management
- Integrating customer channels and agent interfaces with CRM intelligence for reduced service reliance and scaled personalization of customer interactions

Russell Murphy
Contact Centre Performance and Improvement Manager,
Service NSW

16:00   **Chairman's Closing Remarks & End of Exchange**

8x8

8 X 8 results. Enhance productivity and customer experiences everywhere in the world with the industry's only cloud platform that seamlessly combines unified communications, and team collaboration, contact center, and analytics in a single, open and real-time platform that is truly enterprise grade -with no requirement for on site hardware. Our Virtual Contact Centre suite provides full omni channel functionality as well as Post Call Survey, Quality Management and Workforce Management. Our analytics and reporting packages provide our customers with live, real time information on all aspects of the contact centre giving you the power to provide your customers with an exceptional level of customer service.

aspect

Aspect is helping companies like Mercedes Benz, FaceBook, Overstock.com, Raddisson Blue, Dyson, and now iSelect, to reimagine customer service in ways that empower agents and win the hearts and minds of customers. Aspect solutions make it easier to connect questions to answers and engage customers in personalised ways on the communication channels they prefer - all while containing costs. Aspect pair the industry's most advanced interaction management, omni-channel self-service and workforce optimization capabilities with the agility of the cloud and more than 40 years of contact centre experience to deliver better customer relationships. Aspect truly are aligned to a 'customer first' approach.

ACQUIRE

Acquire BPO is a business outsourcer headquartered in Australia with locations in the Philippines, the Dominican Republic and the US. With 7,000+ staff and 12-years' experience, we deliver intelligent contact centre and back-office functions for global businesses.

· We're Australian-owned and managed, offering access to stakeholders and operational transparency.
· We're globally PCI-certified and compliant to ISMS, SOC 2 standards, etc.
· We're powered by world-leading technology, integrating Segue, our in-house platform with omni-channel provider Genesys, to ensure seamless CX.
· Our facilities are fitted out to international standards with carrier-grade infrastructure and global redundancy.
· We take a holistic approach to solutions, integrating RPA, chatbots/Virtual Agents, biometrics and analytics, through our Automation & Intelligence division.
· We're values-driven—committed to people through recognition and development programs.

We're the only Australian company on IAOP's® best outsourcing providers' list, Winner of Best People and Culture at CCW and Most Innovative Company of the Year at the Stevies.

tsa

TSA Group are a 100% Australian-owned business process outsourcing company specialising in helping companies acquire, retain and grow their consumer and business customer bases. We have a dynamic team of over 2,000 people representing the country's largest brands working across eight call centres in Australia, and two call centres in the Philippines. As Australians, TSA is a familiar voice for your customers. As a BPO and extension of your business, we can help you grow revenue and improve customer relationships, whilst reducing your customer service costs.

JOIN THE EXCHANGE NOW

Call **02 9229 2451** or visit **https://contactcenterexchange.iqpc.com.au/**
30 – 31 October 2018, Yarra Valley Lodge, Yarra Valley,

REQUEST INVITE

$1,799+GST registration fee includes: Call 02 9229 1050
• 2 day summit
• Complimentary accommodation at exclusive 5 star venue
• Complimentary transfers between hotel and venue
• Complimentary wine tasting at the Welcome Night