



The 2009

# Customer Experience Management Conference

February 26-27, 2009 New York  
March 19-20, 2009 Chicago

Improving Business  
Results by Design



Pre-Conference Workshops:  
A Step-by-Step Guide  
to Creating a CEM Strategy

Designing Engaging, Branded  
Emotional Customer Experiences

February 25, 2009  
New York, NY

March 18, 2009  
Chicago, IL

[www.conference-board.org/cem](http://www.conference-board.org/cem)

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Customer Experience

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## Pre-Conference Workshops

**Wednesday, February 25, 2009–New York**

**Wednesday, March 18, 2009–Chicago**

Registration and Continental Breakfast: 8–9 am

Workshop A: 9 am–12:30 pm

### **Let's Get Emotional! Designing Engaging, Branded and Emotional Customer Experiences**

Satisfying the basic functional needs of your customers is not enough! Value is shifting from products and solutions to experiences. And in both business and consumer markets, these experiences must be engaging, emotional and branded to stand out in today's noisy and competitive business environment. In this dynamic workshop, you will learn how to use a powerful customer experience design toolkit including:

- Experience Mapping – an approach to creating emotionally engaging experiences
- Brand Value Creator – a technique for understanding how to maximize brand value
- Ideal Customer Experience – a method for having your customers tell you the ideal experience

Jo-Ann Osipow  
Senior Vice President  
**Synovate**

Luncheon: 12:30–1:30 pm

Registration and Luncheon: 12:30–1:30 pm

Workshop B: 1:30–5 pm

### **A Step-by-Step Guide to Creating a CEM Strategy**

Just started on the customer experience journey? Or, having worked on CEM for awhile, do you want to know what to do next? In this workshop, we will complete a customer experience diagnostic to determine current status along the journey and then build a roadmap you may take back to your organization. In this interactive session, you will:

- Diagnose your organization's CEM situation
- Prioritize the actions you must take to improve customer experience
- Create a winning CEM strategy and roadmap

During the session, you will have a chance to network with and learn from other customer experience leaders. By the end of the day, you will be fully prepared to capture the most value from the rest of the conference.



John Carroll III  
Senior Vice President  
**Synovate**

### **Join the Customer Experience Leadership Community (CELC)!**

Because of The Conference Board's significant interest in the power of the customer experience to deliver bottom-line results, we have teamed with Synovate Customer Experience to create the Customer Experience Leadership Community (CELC) where professionals in the field can network with each other in an **online forum** on an ongoing basis to share ideas that lead to business success. The cornerstone of the CELC is this conference, where you will hear about best practices from the leaders in the field, and share ideas with your peers at other companies. If you are interested in joining, please email [kateri.drexler@tcb.org](mailto:kateri.drexler@tcb.org) for more information.

# Customer Experience Management

**Thursday, February 26, 2009–New York**  
**Thursday, March 19, 2009–Chicago**

Registration and Continental Breakfast: 8–9 am

## Radical Customer Experience Processes

**A 9–9:45 am**

Do you know the number one reason why a customer experience strategy will succeed or fail? In this session, we'll explore some radical ways that companies are answering that question. We'll examine:

- Leadership's role in creating a strategic customer experience
- The relentless pursuit of delivering the ideal customer experience
- Driving change management from top leadership all the way to front-line employees

## Case Study: Yahoo!

**B 9:45–10:30 am**

Effective customer experiences don't just happen. Customer experience and product converge in a unique way that requires us to think about the customer experience more holistically. This session will focus on the strategies Yahoo! has employed that have led to:

- Creating a compelling customer experience through better products, services and experience management
- Delivering tangible consumer and business benefit
- Inventing and designing the ingredients to create a successful customer experience
- Identifying the elements of experience engineering



Nick Besbeas  
Senior Vice President, Marketing  
**Yahoo!**

## Improving the Customer Experience – A Short-Term & Long-Term Approach

**C 11–11:45 am**

Today's customers in any market for any product want choices and the best service they can get. This is especially true in highly competitive industries. Addressing customer satisfaction in a manner that is visible is key to retaining loyal customers. In this session, we will discuss:

- How to implement a "Quick Win" program and the benefits
- What long-term actions and strategies work
- Why team member behaviors are critical to driving customer satisfaction



Kerri Nelson  
Vice President of Customer Experience  
**Dun & Bradstreet**

## Luncheon and Keynote Address D 12 noon–1 pm

Choose E1 or E2: 1:15–2 pm

### Ethnography in Action

**E1 1:15–2 pm**

Determining what the customer values is a powerful organizing principle for experience management. It puts the customer's goals at the center of the experience and relationship. In this session, we will cover multiple disciplines from calendarizing customer events to unique ethnography and customer survey/research. We'll discuss how to:

- Define the elements of customer satisfaction
- Develop a complete view of complex business customer relationships and personas
- Innovate powerful CEM solutions for building loyalty

Register online  
[www.conference-board.org/cem](http://www.conference-board.org/cem)

Or by phone 212.339.0345

# Customer Experience Management

## Case Study: Carlson Marketing Worldwide

**E2 1:15–2 pm**

In this session, you will:

- Learn customer experience best practices from leading Fortune 500 companies
- Understand what it takes to move from strategy to execution across channels and communication modes
- Hear about the importance of understanding customer value, and how to apply that knowledge to drive profitability and marketing effectiveness
- Learn the unique aspects of understanding customer needs, and how to use that insight to create a memorable and relevant customer experience

Jim Shroer  
President and Chief Executive Officer  
**Carlson Marketing Worldwide**

Choose F1 or F2: 2:15–3 pm

## Customer Experience Mapping

**F1 2:15–3 pm**

This session will explore:

- How to build a complete and accurate view of a customer from multiple data dimensions
- How to turn information into customer insight and develop a segmentation that enables companies to create tailored customer experiences
- Best practices and case studies

## Customer Experience Networks: Creating Great Experiences for a Web 2.0 World

**F2 2:15–3 pm**

In this session, discover what we have learned about the changing relationships of customers in light of social media and the Web. Learn:

- The 5 key digital values that organizations must focus on to create great experiences for the new interconnected customer
- How to improve the customer experience in the digital age

Case studies will include those from: Nike, Dove, Nickelodeon, Diet Coke & Mentos, Amazon, Affinia Hotels, Cisco, Salesforce.com, Dell and Procter & Gamble.

*New York*



David Rogers  
Executive Director  
Center on Global Brand Leadership  
**Columbia Business School**

Choose G1 or G2: 3:15–4 pm

## Case Study: Avis

**G1 3:15–4 pm**

To create a virtuous circle from Brand Promise to Customer Expectations to Customer Experience to Loyalty to Brand Equity, the organization must be unanimously and uniformly focused on delivering the right Customer Experience.

At Avis Budget Group, the brand portfolio and the underlying business strategy find their expression in differentiated and carefully managed Customer Experience strategies, such as:

- Brand Promise and Customer Expectations
- Measuring the experience and identifying customer sensitivities
- Identifying the components of the customer experience: taking it apart and putting it together again
- The challenges of cross-functional alignment
- The results: loyalty and brand equity and how they are measured

Scott Deaver  
Executive Vice President  
**Avis Budget Group**

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# Customer Experience Management

## Charting Customer Perceptions of Brand Experience - Keeping our Finger on an Intangible Pulse

G2 3:15–4 pm

Measurement of customer behavior is easy. Measuring how the idea of a brand is formed, and how that idea evolves over time is not. The brand experience provides clues, but brands are shaped by many factors outside the control of the experience architect.

How can we better understand these dynamic forces, and get to know our own brands better through the eyes and minds of our customers?

Martin P. Gierke  
Manager, Brand Strategy & Analysis  
**Caterpillar Inc.**

## Transitioning to a Customer Centric Organization: Giving Customers a Seat at the Strategic Decision Making Table

H 4:15–5 pm

When an organization truly commits to exceeding customers' expectations and delivering a superior customer experience, having the right customer listening posts in place is of the utmost importance to success. In this session, we will share strategies and tangible examples of how incorporating customer feedback into management processes can help you:

- Focus the entire organization on the customers' core priorities
- Infuse market intelligence into the product innovation process
- Identify and remove inconsistency in the customer experience at each touchpoint
- Validate the ROI of customer experience investments in real-time

Megan Crowley  
Director, Market Research  
**Norwegian Cruise Line**

Valory Myers  
Assistant Vice President  
**Synovate**



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Networking Reception: 5–6 pm

Hosted by:   
**synovate**  
Customer Experience

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**Friday, February 27, 2009–New York**  
**Friday, March 20, 2009–Chicago**

Continental Breakfast: 8–9 am

**Case Study: Waste Management, Inc.**

1 9–9:45 am

Kelly Cook  
Vice President  
Employee & Customer Engagement  
**Waste Management, Inc.**

# Customer Experience Management

## Aligning Key Internal Stakeholders to Deliver the Brand Promise to Customers

J 9:45–10:30 am

Learn how to use your brand promise as a key motivator for customer experience touchpoint alignment. Through this session, two actual case examples will be reviewed to reveal some universal do's and don'ts when it comes to building brand strength through customer experience initiatives. This will also reveal the human factor and necessity to gain buy in, understanding, commitment, and advocacy from the people on the front lines impacting the customer experience. Examples in the healthcare and financial services sectors will be used.



Ed Faruolo  
Vice President, Brand Development  
**Lincoln Financial Group**

## Customer Experience Engineering: a Scientific Approach to Customer Communication

K 10:45–11:30 am

Prudential Financial and Xerox Global Services developed an innovative collateral system to offer personalized materials for introducing a new life insurance product targeted to affluent customers. Prudential Financial wanted to offer its producers flexibility in brochure options without compromising regulatory compliance with specific product language. They also needed a creative and flexible approach to help producers communicate product benefits to customers while differentiating themselves from competitors and meeting aggressive time frames for release of the new product.

Attendees will learn how to:

- Differentiate their companies from competitors through personalized collateral
- Increase effectiveness of sales and marketing collaterals
- Increase productivity and loyalty of the target audience
- Reduce the cycle time of launching a new product to the market

Paul Lundy  
Managing Director, Document Outsourcing  
and Communication Services  
Xerox Global Services  
**Xerox Corporation**

## Guaranteeing Quality CEM When Outsourcing Servicing Aspects

L 11:30 am–12:15 pm

With the increasing reliance on outside vendors, the task of assuring quality customer experiences becomes more complex. In this session, we will explore how some companies are tackling this challenge.



## Unconditional Guarantee

For over 90 years, The Conference Board has been providing senior executives worldwide with opportunities to share practical business experience. If for any reason you are not satisfied with this conference, please let us know. We will immediately credit your attendance to another conference of your choice, or, if you prefer, promptly refund 100% of your registration fee.

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[www.conference-board.org/cem](http://www.conference-board.org/cem)

Or by phone 212.339.0345

# To Register

**Online** www.conference-board.org/cem

**Fax** 212 836 9740

**Phone** 212 339 0345 8:30 am to 6 pm ET Mon-Fri

**Mail** The Conference Board  
PO Box 4026, Church Street Station  
New York, NY 10261-4026

## Select Concurrent Sessions and Pricing

### Conference (Choose One)

- February 26-27, 2009, New York (996009-1)
- March 19-20, 2009, Chicago (909009-1)

### Pre-Conference Workshops (Choose One or Both)

- Workshop A: February 25, 2009, New York (B95009-1)
- Workshop B: February 25, 2009, New York (B96009-1)
- Workshop A: March 18, 2009, Chicago (B56009-1)
- Workshop B: March 18, 2009, Chicago (B57009-1)

### Thurs. February 26, 2009 / Thurs. March 19, 2009

- E1 or  E2 choose one
- F1 or  F2 choose one
- G1 or  G2 choose one

### Pre-Conference Workshops

- One Workshop  
Conference Board Associates ..... \$545  
Non-Associates ..... \$645
- Both Workshops  
Conference Board Associates ..... \$1,090  
Non-Associates ..... \$1,290

### Conference

Register by November 14, 2008 and save \$200!

- Conference Board Associates .. \$1,995 (\$2,195 after 11/14/08)
- Non-Associates ..... \$2,295 (\$2,495 after 11/14/08)

Would you be interested in joining the Customer Experience Leadership Community (CELC) where professionals in the field can network with each other in an **online forum** to share ideas that lead to business success?

## 2 Payment

Check payable to The Conference Board for \$ \_\_\_\_\_.

**Charge to my:**  American Express  Discover  MasterCard  Visa

Acct. No. \_\_\_\_\_ Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## 3

Agenda Code \_\_\_\_\_

Please provide agenda code from mail panel.

## 4 Please print or attach a business card; for additional registrants, duplicate this form.

Name \_\_\_\_\_ Title \_\_\_\_\_

Department \_\_\_\_\_ Company \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone ( ) \_\_\_\_\_ Fax ( ) \_\_\_\_\_ E-mail \_\_\_\_\_

### Cancellation Policy

Full refund until three weeks before the meeting. \$500 administration fee up to two weeks before the meeting. No refund after two weeks before the meeting. Confirmed registrants who fail to attend and do not cancel prior to the meeting will be charged the entire registration fee.

### Team Discounts per person

For a team of three or more registering from the same company at the same time, take \$200 off each person's registration.

### Hotel Accommodations

Fees do not include hotel accommodations. For reservations, contact the hotel directly no later than the cut-off date and mention The Conference Board Customer Experience Management Conference.

*New York*  
Westin New York at Times Square  
270 West 43rd Street  
New York, NY 10036  
Tel: 212 201 2700

Hotel Reservations Cut-off Date:  
February 3, 2009

*Chicago*  
Wyndham Chicago  
633 North St. Clair  
Chicago, IL 60611  
Tel: 312 573 0300

Hotel Reservations Cut-off Date:  
February 24, 2009

## The companies that are represented include:

- **Avis Budget Group**
- **Carlson Marketing Worldwide**
- **Caterpillar Inc.**
- **Columbia Business School**
- **Dun & Bradstreet**
- **Lincoln Financial Group**
- **Norwegian Cruise Line**
- **Synovate**
- **Waste Management, Inc.**
- **Xerox Corporation**
- **Yahoo!**

Agenda Code



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