



The 2014

Customer Experience Conference

How industry leaders get customers to fall in love with their experience

March 27 – 28, 2014

March 26, 2014 Pre-Conference Workshop

The Ritz-Carlton, New York, Battery Park



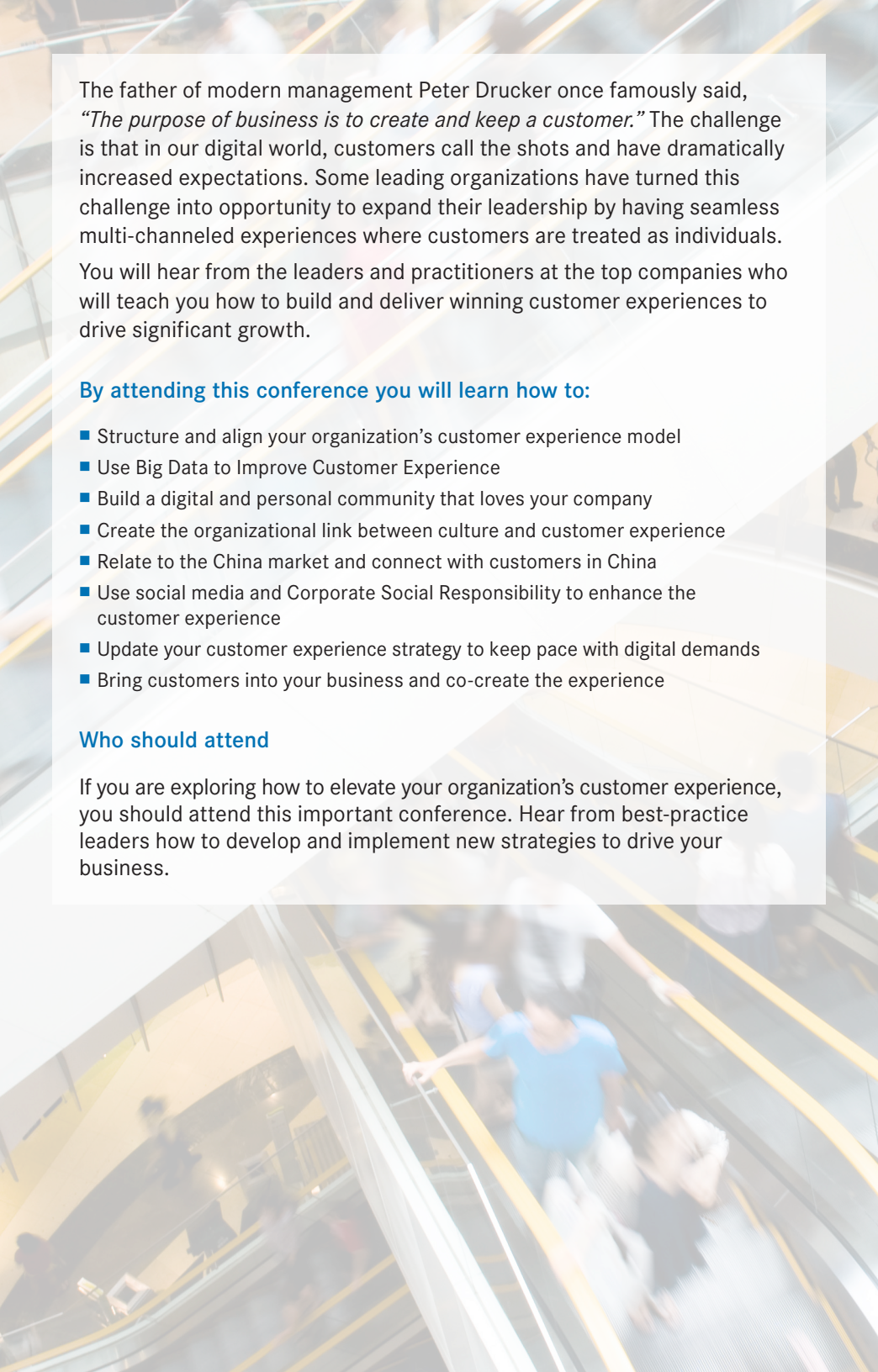
Learn from:

NettApp, Zappos, Walmart, Build-A-Bear Workshop, USAA, Southwest Airlines, Stericycle, The Ritz-Carlton, Rolls-Royce, M&T Bank, Xerox, Fed Ex, Cleveland Clinic

Presented with assistance from



Ipsos Loyalty



The father of modern management Peter Drucker once famously said, *“The purpose of business is to create and keep a customer.”* The challenge is that in our digital world, customers call the shots and have dramatically increased expectations. Some leading organizations have turned this challenge into opportunity to expand their leadership by having seamless multi-channeled experiences where customers are treated as individuals. You will hear from the leaders and practitioners at the top companies who will teach you how to build and deliver winning customer experiences to drive significant growth.

By attending this conference you will learn how to:

- Structure and align your organization’s customer experience model
- Use Big Data to Improve Customer Experience
- Build a digital and personal community that loves your company
- Create the organizational link between culture and customer experience
- Relate to the China market and connect with customers in China
- Use social media and Corporate Social Responsibility to enhance the customer experience
- Update your customer experience strategy to keep pace with digital demands
- Bring customers into your business and co-create the experience

Who should attend

If you are exploring how to elevate your organization’s customer experience, you should attend this important conference. Hear from best-practice leaders how to develop and implement new strategies to drive your business.

Pre-Conference Workshop Wednesday, March 26, 2014
The Ritz-Carlton, New York, Battery Park

WORKSHOP 1 – 5 PM

Take the 7 Point Stress Test for Your Customer Experience Strategy – An Active Learning Workshop for Leaders

New to customer experience? Or already on your journey and need to know what to do next? Maybe you are just worried that you are not doing enough in Big Data, Social, Local, Mobile and a plethora of other new customer experience realms?

In this hands-on action planning session you will stress test your 2014 customer experience plans and gain confidence you are going the right direction. Together, we will:

- Expose gaps and new opportunities in your current customer experience efforts
- Ensure your plans include sufficient experimentation in leading edge techniques and tools
- Develop a revised plan that incorporates proven practices shown to improve customer experience results

Throughout the workshop, you will have a chance to network with and learn from other customer experience leaders. By the end of the session, you will have an improved plan and be fully ready to gain the greatest value from the remainder of the conference. Join us to take the stress out of your customer experience efforts!

Facilitator

John Carroll III, Global Head of Clients, **Ipsos Loyalty**

Call Customer Service at 212 339 0345

Thursday, March 27, 2014

REGISTRATION AND CONTINENTAL BREAKFAST 7:30 – 8:30 AM

WELCOME AND INTRODUCTION 8:30 – 8:45 AM

Robert Reiss, Program Director, **The Conference Board**

A 8:45 – 9:35 AM

The Future of Customer Experience

Build-A-Bear Workshop is widely credited with reinventing the entire retail customer experience where customers become engaged in the process of creating their own customized product. You'll hear from the CEO, perspective on how Build-A-Bear Workshop creates winning customer strategies and how the customer experience will change over the next few years.

Sharon John, CEO, **Build-A-Bear Workshop**

B 9:35 – 10:25 AM

Case study: How to structure and align your organization's customer experience model

USAA is a perennial leader as a top company delivering exemplary customer experience. You'll hear a case study of how USAA restructured their entire model and the lessons they learned in creating an elevated member experience.

Wayne Peacock, Head of Member Experience, **USAA**

NETWORKING REFRESHMENT BREAK 10:25 – 10:45 AM

C 10:45 – 11:30 AM

Surprising, Futuristic, and Yet Oh So Real: Using Big Data to Improve Customer Experience

Big data is a game changer in customer experience. Ipsos Loyalty has long been a global leader in advising top companies how to improve their customer experience. You will learn the best practices of how you can use the power of big data to positively transform your customer experience.

John Carroll, Global Head of Clients, **Ipsos Loyalty**

D 11:30 AM – 12:20 PM

Case study: Building a world-class healthcare call center organization

Paul Spiegelman build a company known as the top healthcare call center through counter-intuitive unique practices. Now working as Chief Culture Officer for a multi-billion company, and as an author of 3 top books, Spiegelman has a unique and original perspective on how to build an exceptional company that anticipates and delivers exactly what the customer wants.

Paul Spiegelman, Founding CEO, The Beryl Companies & Chief Culture Officer, **Stericycle**

E 1:20 – 2:10 PM

Case study:

Building a digital and personal community that is nuts about your company

Southwest Airlines has had more profitable quarters than any airline in history. Their secret – an incredible model built around the customer. You'll learn first hand the secrets of which key fundamentals drive an exceptional service model.

Teresa Laraba, Senior Vice President Customers, **Southwest Airlines**

F 2:10 – 2:55 PM

I Love Transformation – How to Engage your Employees, Embrace Change and Accelerate Results



“Change is hard” and “it is a multi-year journey” are the most common declarations associated with customer experience transformation. We disagree. Based on experience from 150 transformations, Strativity will present proven methods to accelerate customer experience success by engaging employees turning change into fun and personal commitment. Utilizing case studies learn how a UK company saved 2000 jobs with a CX transformation and how Mercedes Benz became number 1 in customer satisfaction.

Lior Arussy, CEO, **Strativity**

NETWORKING REFRESHMENT BREAK 2:55 – 3:15 PM

G 3:15 – 4:45 PM

Creating the organizational link between culture and customer experience

Most great companies recognize the importance of building a great culture that can drive the customer experience. You'll first hear a 30-minute overview by NetApp on how they became the #1 Best Company to work for in America, 2009. Then you'll hear from a panel of 3 companies who have bridged tremendous cultures with exceptional service. You'll hear practical insights in building a company admired and loved by staff and customers.

Moderator

Tom Mendoza, Vice Chairman, **NetApp**, Fortune's # 1 Best Company to Work for in America, 2009

Panelists

Stacie Pallotta, Senior Director, Office of Patient Experience

Cleveland Clinic Health System

Kimberly Rath, President, **Talent Plus**, #2 Best Small Company to work for in America

Michael W. Weinstock, Group Vice President, **M&T Bank**

Conference KeyNotes

Registration includes this summary of conference highlights
and a post-conference interactive webcast

H 4:45 – 5:30 PM

Your People: The Key to Customer Loyalty

SESSION SPONSOR



This interactive session defines the obstacles and organizational challenges companies face when trying to bring their brand promise and customer experience to life across all customer-interaction channels. Session attendees will learn about the three strategic focus areas; Creating a Customer-First Culture, Empowering Managers to Act Like Owners and Delivering an Authentic Experience on the frontline that supports the brand promise to drive loyalty and ultimately sales.

A combination best practices presentation with interactive session, this workshop will help attendees better understand the canyons that cause organizational dysfunction and how it impacts all levels of the organization from leaders to managers to individual contributors.

Speakers

Gary Magenta, Senior Vice President, **Root Inc.**

Marianne Scaffidi, Director of Learning and Development, **Swarovski North America**

NETWORKING RECEPTION 5:45 – 6 :45PM

Friday, March 28, 2014

CONTINENTAL BREAKFAST 7:30 – 8:30 AM

WELCOME AND INTRODUCTION 8:30 – 8:40 AM

Robert Reiss, Program Director, **The Conference Board**

I 8:40 – 9:30 AM

Case study: [Inside the Zappos customer model](#)

Zappos is considered by many to be the gold standard of authentic customer service. You'll learn directly from Zappos' leader of the customer model, what Zappos does differently to deliver such incredible service.

Rob Skiefer, Director, Customer Loyalty, **Zappos**

J 9:30 – 10 AM

[How to connect with customers in China](#)

For any global company the one market everyone wants to understand is China. You'll learn the fundamentals of what makes the China market tick and what it takes to connect with the China customer.

Savio Chan, CEO, **US China Partners**

NETWORKING REFRESHMENT BREAK 10 – 10:20 AM

Presentations

Available online in advance of the conference

K 10:20 – 11:20 AM

Panel of Practitioners:

Key Elements of a Successful Customer Experience Program

We live in a multi-channel, 24/7 world. That's a lot of chances for your customer to get to know you! Are you generating the connections you seek across all channels, 24 hours a day? Are you afraid that you are missing opportunities to share your message, to meet your customer where they are, and to respond appropriately at all times? You are not alone. You will hear best practices from these industry leaders on how to structure and deliver world class experiences.

Moderator

David Hsiao, Head of Software Quality, **Ericsson**

Panelists:

Dave Blair, Director of Customer Experience, **Rockwell Automation**

Don Bland, Director, Customer Care, FedEx Tech Connect, **FedEx Corporation**

Dave Maskens, Manager, Customer Experience, Worldwide Quality & Customer Loyalty, **Xerox Corporation**

Blair Skramstad, Director, Strategic Marketing, **John Deere Financial**

NETWORKING REFRESHMENT BREAK 11:20 – 11:25 AM

L 11:25 – 11:55 AM

The Value of Customer Experience Centered Brand Strategy

James Cerruti, Senior Partner Strategy, **Brandlogic**

Stephen Schoffstall, Chief Marketing Officer, **Legrand North America**

M 11:55 AM – 12:55 PM

Panel: Digital and Social Media Breakthrough in Customer Experience

Trish Wheaton, Managing Partner Global New Business, **Y&R Advertising**

Chad Mitchell, Senior Director Digital Communication, **Walmart**

Michele Barlow, Executive Vice President Enterprise Marketing, **Bank of America**

Ginger Conlon, Editor-in-Chief, **Direct Marketing News**

CONFERENCE SUMMARY AND CLOSE 12:55 – 1 PM

Robert Reiss, Program Director, **The Conference Board**

Media partner  **MWW**

Call Customer Service at 212 339 0345



Registration Information

Online www.conferenceboard.org/customerexperience2

Email customer.service@conferenceboard.org

Phone 212 339 0345 8:30 am to 5:30 pm ET Monday through Friday

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The Ritz-Carlton New York, Battery Park

Conference (909014-2)

March 27 - 28, 2014

Associates **\$2,295**

Non-Associates **\$2,895**

Pre-Conference Workshop (B56014-2)

March 26, 2014

Associates **\$505** Non-Associates **\$605**

Hotel Accommodations

Fees do not include hotel accommodations. Due to the popularity of the conference, the group block at the Ritz-Carlton New York, Battery Park has already sold out. We have secured an additional room block at the Marriott Downtown hotel, which is about a 10 minute walk up the street from the Ritz. For discounted reservations, please call the reservations hotline listed below no later than the cut-off date and mention the **Customer Experience Conference**.

New York Marriott Downtown
85 West Street at Albany Street
New York, NY 10006
Reservations: 877-303-0104

Hotel reservations cut-off date:
Monday, March 10, 2014

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 \$300 off each person's registration.

One discount per registration. Multiple discounts may not be combined.



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The Conference Board
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Promotion Code