



# 11<sup>th</sup> Annual Customer Experience CONFERENCE

Using analytics and culture  
to deliver journeys that  
customers crave

*Voted "One of the 50 Best Conferences  
to Attend" in 2014 by The Muse*

## Conference

March 26 – 27, 2015  
Conrad New York  
New York, NY

## Pre-Conference

March 25, 2015

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# 11<sup>th</sup> Annual Customer Experience CONFERENCE

High Sell-Out Risk!  
Reserve Your Spot  
Today

The Conference Board CEO Challenge 2015 finds that “Changes in Customer Behavior” is the number one hot button issue for CEOs in the United States, Europe, China, India and Latin America. The 2015 Customer Experience Conference has been formulated to help Customer Experience Professionals design and deliver a customer experience that will stay ahead of these changing customer behaviors.

Sold-out for the past two years, The 2015 Customer Experience Conference will unveil a dynamic new format designed to mirror the course of journey mapping for attendees. Travelling sequentially through a customer experience blueprint will bring to life the changes in process, culture and attitude necessary for true transformation.

## Why does customer experience continue to climb as a priority for c-suite executives?

The return on investment can be found in hard dollars, including faster revenue growth, better margins, cost savings and- perhaps most important- a larger share of wallet from your most important customers. Don't miss this meeting- and the start of your journey.

## What makes this Customer Experience Conference Unique?

- 8+ keynote speeches by CEOs from Sprint, SAP, Reverie and more!
- Insights from 20+ customer experience practitioners who have successfully transformed their companies and achieved excellence in customer experience
- Peer-to-Peer engagement with 200 other senior executives responsible for building and institutionalizing customer experience models
- Speaker takeaways and tactics, offering actionable ideas you can use immediately
- Customized advice and insight through Q&A, workshops and networking

## Who Should Attend?

The Customer Experience Conference is designed for those responsible for leading customers experience and satisfaction at leading companies worldwide. Titles have historically included:

- Chief Experience Officer
- Chief Marketing Officer
- Chief Customer Officer
- Head's VPs, Directors and Managers of
  - Customer Experience
  - Marketing
  - Customer Experience Strategy
  - Brand/Customer Loyalty
  - Consumer Intelligence
  - Customer Insights and Analytics
  - Customer Care
  - Digital Experience
  - Client Management
  - Communications and Social Media
  - Culture
  - Call and Contact Center

## Our Speakers

Differentiate your brand and transform your company with expert discussions from the top thinkers and practitioners in customer experience including CEOs and executives including:

- Kelly Fisher, SVP, Relationship Care Strategy, **American Express**
- Jeff Mango, Vice President, Customer & Business Intelligence, **Verizon Wireless**
- Stormy Simon, President, **Overstock.com**
- Jasmine Green, Vice President, Chief Customer Advocate, **Nationwide**
- Christine M. Hill, Global Customer Experience Strategy Leader, **Eli Lilly and Company**
- Larry Augustin, CEO, **SugarCRM**
- Michael Houlihan and Bonnie Harvey, Co-founders, **Barefoot Wine**
- Adam Goldstein, President, **Royal Caribbean Cruises**
- Ellen M. Brezniak, Senior Vice President, Customer Operations, **Constant Contact**
- Bill McDermott, CEO, **SAP**
- James Merlino, MD, Recent Chief Experience Officer, **Cleveland Clinic** and author of “*Service Fanatics*”
- Steve Kraus, Sr. Director, Product Marketing, **Pegasystems**
- Martin Schneider, Head of Product Evangelism, **SugarCRM**
- Ron Tortaro, General Manager Global Financial Services, **Pitney Bowes**
- Lior Arussy, CEO, **Strativity**
- Alex Bombeck, former Chief Digital Officer, **Havas Worldwide**, and President, **Sparks Grove**
- Dan Hesse, Former CEO, **Sprint**
- Martin Rawls- Meehan, Founder and **CEO, Reverie**
- Rockwell F. Clancy II, Vice President, **J.D. Power**
- Shaila Kapur, Customer Experience Executive, **Independence Blue Cross**
- Diane Thomas, Managing Director and Head of Global Insights for **Citi Global Consumer Banking**

To register and view the detailed agenda visit  
[www.conferenceboard.org/customerexperience](http://www.conferenceboard.org/customerexperience)

## Loyalty Factors that Help You Reach Your Customers' Hearts

Customer values have changed substantially since the 1950s dawn of consumerism. It is becoming increasingly rare for a customer to make a purchase based on brand identity alone. When surveying the full spectrum of industries, from the public sector's captive audience to e-tailors, who lack brick and mortar, loyalty is increasingly driven by a customer's experience with a product or service. As the buying power begins to shift, from the Baby Boomers and Gen X to the Millennials and Gen Z, the type of customer experience provided must evolve to meet the modern consumer's needs.

This interactive workshop will leverage customer insight videos and research findings to better help you understand the customer loyalty factors that are driving revenue in 2015. You will hear success stories about how fortune 500 companies like Nike and Apple have leveraged these loyalty factors to increase customer retention, while analyzing how you can integrate these factors into your own marketing, sales and service initiatives. As we dive deeper into what the customer wants, we'll help you segment your customer groups based on demographics and understand how to emotionally engage them at each and every touchpoint.

This workshop will enable you to reach the heart of what matters most during the customer journey as you:

- Gain insight into the 2015 loyalty factors that are most important to your customers
- Learn about tactics used to increase customer engagement from leading companies, who have cutting-edge customer experience programs
- Expose weaknesses in your current customer experience efforts
- Develop a plan for how to incorporate customer loyalty factors to create a stronger end-to-end customer experience
- Segment your customers based on demographics and plan for the generational shift in purchasing power

Lynn Olson, Vice President, Sales and Marketing, **PTP**

## CONFERENCE • DAY 1

Thursday, March 26, 2015

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 – 9:30 AM

### The Relentless Quest: A CEO's Perspective on Customer Experience Transformation

In 2013 Sprint was cited by the American Customer Satisfaction Index as the #1 most improved company in customer satisfaction over the last five years, and across 47 industries. The CEO who led this charge, Dan Hesse, will share the inside story on how Sprint established goals, what it took to achieve success, and specific practices and tactics around execution. In addition, he will offer guidance on and how to sell your program to your CEO and board.

Dan Hesse, Former CEO, **Sprint**

B 9:30 – 10:15 AM

### When Healthcare and Patient Care Mean the Same Thing

Cleveland Clinic, ranked one of America's Top 4 Hospitals 2014-15 by US News & World Report, is recognized as a leader in clinical outcomes and patient experience. Learn how a major healthcare system redefined the concept of patient experience and then aligned its 43,000 employees around a Patient First strategy. Merlino will take us from their initial vision, right through the -often difficult -execution, offering actionable lessons along the way.

James Merlino, MD, Recent Chief Experience Officer, **Cleveland Clinic** and author of "*Service Fanatics*"

C 10:15 - 10:25 AM

### Finding the Sparkle: Providing Jobs & Creating a Future for Adults with Disabilities

The Prospector Theater in Ridgefield, Connecticut is revitalizing the romanticism of moviegoing by reimagining the possibilities for people with disabilities – America's most talented and untapped workforce. Through her discussion, Valerie Jensen, the founder and visionary behind the theater, will highlight the simple accommodations businesses of any size can make in order to benefit from this group of capable, ready and willing workers.

Valerie Jensen, Founder and CEO, **The Prospector Theatre**

Networking Refreshment Break • 10:25 – 10:45 AM

D 10:45 – 11:30 AM

### The Power of One: One Company. One Culture. One Brand.

Recognized as a customer-first mutual company for 90 years, Nationwide's clients were always at the heart of business decisions. But significant growth brought too many different businesses all under one roof, resulting in dozens of products going to market under multiple brand names. At risk of losing focus on the customer, Nationwide made the bold move to migrate multiple brands under a single brand name: Nationwide. Learn how this move in brand name led to a seamless customer experience. Creating an Office of Customer Advocacy and calling herself Listener in Chief were two of the first steps Jasmine Green made on her quest to serve customers. Find out what else worked, and maybe some things that did not.

Jasmine Green, Vice President, Chief Customer Advocate, **Nationwide**

E 11:30AM – 12:15 PM

### Future Vision: The Digital Customer Will Change Things Forever

Change management needs strong leadership. Bill McDermott has led significant growth at SAP through his uncanny ability to see "what's next," and then build effective business models to meet new needs. Find out how SAP consistently delivers for customers, and what Bill has done to get ready for the digital customer of the future. Part customer service, part crystal ball, Bill will provide insights into what our future holds, and how to be ready for it.

Bill McDermott, CEO, **SAP**

Networking Luncheon • 12:15 – 1:15 PM

F 1:15 – 2:00 PM

### Customer Experience: Moving Beyond Conversation to Meaningful Action

The Conference Board's Customer Experience Council Members will share in an interactive session examples of pivotal enabling leader activation and measurement in a sustainable manner.

Facilitator:

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

Panelists:

Christi Hill, Global Customer Experience Strategy Leader, **Eli Lilly and Company**

Jeff Mango, Vice President, Customer & Business Intelligence, **Verizon Wireless**

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G 2:00 – 3:00 PM

### Customer Journey Management: Why the Human Touch Points Matter Most

Businesses of all shapes and sizes are focusing more than ever on the concept of “customer experience.” For many businesses, this involves the automation and optimization of the digital touch points that support how companies interact with customers. However, as organizations focus on the digital aspects of mapping and optimizing a typical customer journey – all too often the human element of customer interactions gets short shrift. In this session, SugarCRM CEO Larry Augustin will outline why organizations ignoring the human element of customer experience do so at their own peril, and will highlight some best practices and examples of organizations that foster extraordinary customer relationships by focusing on the human as well as digital touch points along the customer journey.

Larry Augustin, CEO, **SugarCRM**

H 3:00 – 3:45 PM

### The 5 Critical factors to Customer Experience Excellence

Everyone starts with great passion and a commitment to deliver exceptional customer experiences. Yet most Customer experience programs fail to deliver differentiating experiences and end up at a very tactical level. Discover the 5 critical success factors that will elevate your customer experience journey to the fast lane to success. Based on over 160 transformation projects touching over 250 Million customers, this presentation will explore the obstacles and opportunities in your customer experience journey.

Lior Arussy, CEO, **Strativity**

Networking Break • 3:45 – 4:00 PM

I 4:00 – 5:00 PM

### At the Heart of Customization is the Customer: A Panel Discussion

Consumer insights are the secret sauce to customer experience transformation. How can you harness the customer insights from your company into transformational changes? Hear from three seasoned and successful customer experience practitioners about how they have transformed their businesses – and their industries – by becoming fully customer-centric.

Moderator: Robert Tas, Chief Marketing Officer & Senior Vice President Marketing, **Pegasystems Inc.**

Kelly Fisher, SVP, Relationship Care Strategy, **American Express**

Martin Rawls- Meehan, Founder and CEO, **Reverie**

Adam Goldstein, President, **Royal Caribbean Cruises**

J 5:00 – 5:45 PM

### Overcoming the Six Barriers to Understanding and Improving Your Customer Experience

Most companies recognize the linkage between customer experience and financial results. Yet despite their best efforts, many companies fall short of delivering an outstanding experience and reaping the associated rewards. This session will reference real world examples and findings from its cross-industry customer satisfaction research to explore the six barriers companies face in delivering an outstanding customer experience and provide best practices for overcoming them to become a customer-centric organization.

Rockwell F. Clancy II, Vice President, **J.D. Power**

Networking Reception • 6:00 – 7:00 PM

Continental Breakfast • 7:30 – 8:30 am

Welcome and introduction • 8:30 – 8:45 AM

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

K 8:45 – 9:30 AM

### Happily Ever After: When Brand Promise Meets Brand Experience

Hear the story of how one passionate employee rose to be President of a company by focusing on just one thing – remarkable customer service. By finding, and then serving as, the customer’s voice, Stormy Simon propelled Overstock.com into its current rank as one of the top 3 online companies for customer service. This tale will show you how to gain great insight into, and win the heart of, the online consumer.

Stormy Simon, President, **Overstock.com**

Networking Break • 9:30 – 9:45 AM

L 9:45 – 10:45 AM

### Breakthrough Digital CRM Concepts and Tools: A Panel Discussion

Find out about the best practices from three top CRM-driven companies. With specific focus on digital applications, this panel of experts will help you identify the right CRM tools for your needs. Learn how they transformed their respective customer journeys to be fully digital.

Moderator: Martin Schneider, Head of Product Evangelism, **SugarCRM**

Panelists: Alex Bombeck, former Chief Digital Officer, **Havas Worldwide**, and President, **Sparks Grove**

Ellen M. Brezniak, Senior Vice President, Customer Operations, **Constant Contact**

Diane Thomas, Managing Director and Head of Global Insights for **Citi Global Consumer Banking**

Networking Break • 10:45 – 11:00 AM

M 11:00 AM – 12:00 PM

### Implementation

After developing your customer journey, the focus is now implementation. These experts will explain how to pull it all together to implement and increase your organization’s competitive edge. They will share how to help your entire organization and customers learn, execute and succeed.

Ron Tortaro, General Manager Global Financial Services, **Pitney Bowes**

Shaila Kapur, Customer Experience Executive, **Independence Blue Cross**

N 12:00 – 12:45 PM

### The Ultimate Customer Experience

Michael Houlihan and Bonnie Harvey are the founders of Barefoot Wine and the authors of the *New York Times* bestselling business book *The Barefoot Spirit* (copies will be available to 72 attendees). They started and then successfully sold Barefoot, which is now a top global brand. Understanding customer experience is one of the keys to their success. At the start, with virtually no money and no wine industry experience, they employed innovative ideas to overcome obstacles and create new markets and strategic alliances while pioneering cause marketing and performance-based compensation. These strategies saved them advertising and focus group dollars, while giving customers an extra reason to choose their product and spread the word about it.

Michael Houlihan and Bonnie Harvey, Co-founders, **Barefoot Wine**

Conference Summary and Close • 12:45 – 1:00 PM

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



# REGISTRATION INFORMATION

**Online** [www.conferenceboard.org/customerexperience](http://www.conferenceboard.org/customerexperience)

**Email** [customer.service@conferenceboard.org](mailto:customer.service@conferenceboard.org)

**Phone** 212.339.0345  
8:30AM – 5:30PM ET, Monday – Friday

**THE CONFERENCE BOARD**  
Trusted Insights for Business Worldwide



## The 11<sup>th</sup> Annual Customer Experience Conference

Using analytics and culture to deliver journeys that customers crave

### Conference (909015-2)

March 26 - 27, 2015

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| Associates | <b>\$2,295</b> |
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| Non-Associates | <b>\$2,895</b> |
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### Pre-Conference (B56015-2)

March 25, 2015

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| Associates | <b>\$605</b> |
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| Non-Associates | <b>\$705</b> |
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11<sup>th</sup> Annual

## Customer Experience CONFERENCE

### Hotel Accommodations

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

#### Conrad New York

102 North End Ave  
New York, NY 10282  
Phone: 212.945.0100

**Hotel Reservations Cut-off Date:** March 2, 2015

### 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.

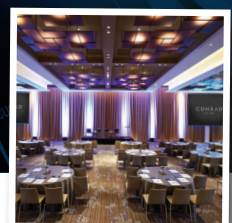
One discount per registration. Multiple discounts may not be combined.

## Conrad New York

From spectacular art and design, to outstanding culinary and sustainable innovation, the Conrad New York is Lower Manhattan's newest luxury address.

Admire the monumental art of Sol LeWitt in the atrium of this New York City luxury hotel. Taste the Mediterranean influences in dishes from ATRIO. Shop for New York gifts and luxury lifestyle goods at Accents New York, Bloom, Vintry Wines, Battery Place Market, or Artsee Eyewear.

Take advantage of the hotel's location near Wall Street, the New York Stock Exchange, and the new National 9/11 Memorial. Host a conference or social event in our impressive 30,000 sq. ft. meeting space. Enjoy the innovative cuisine of Danny Meyer's Union Square Events, the exclusive food and beverage partner of the hotel's on-site conference and event facilities.



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