Channeling Change for Breakthrough Customer Engagement

12th Annual Customer Contact, West: A FROST & SULLIVAN EXECUTIVE MINDXCHANGE
Part of our International Customer Contact Executive MindXchange Series

October 23 - 26, 2016
JW Marriott Tucson Starr Pass Resort & Spa
Tucson, AZ

www.frost.com/ccw
#CCFrost

STRATEGIC PARTNER

“Most valuable get together I go to! Excellent as always.” – Vice President, Operational Strategy & Performance, BLUECROSS BLUESHIELD

“Intimate conference with great networking built in.” – Chief Technology Officer, INTEL CORPORATION

“…Each of the collaboration zones and success stories provided real-life usable content. The vendors provided open dialogue in a non-sales environment, which greatly added to the overall learning.” – Manager, J.C. PENNEY CO. INC.

“Innovative, inspiring; worth every minute!” – Senior Product Manager, FRONTIER COMMUNICATIONS

“I walked away with several key ideas to take back to my organization. I also made valuable contacts relating to several business issues that I am trying to solve and can reach out to them to them after the event.” – Director, AUTOTRADER.COM

“Excellent networking opportunity, great forum for sharing best practices and a lot of fun as well.” – Director, Sales & Support, CHOICE HOTELS INTERNATIONAL

“It is the best event in the space...The opportunity to network and share best practices is plentiful and long term relationships are established.” – Vice President, Call Center Operations, 1-800-DENTIST
WHY YOU MUST ATTEND

1. Competition is Ablaze: Are you driving your company to marketplace leadership? The customer experience you create and deliver is what will give your organization a competitive advantage in an increasingly commoditized world. Develop a roadmap for transformation and move the customer care bar from good to great.

2. Technology Innovation is Accelerating: It's dizzying how fast it's moving. Social customer care seems like yesterday's news since the evolution of social networks and online communities. The advent of cloud, mobile and analytics require a skilled agility. Keep pace with the advancements, know when to hit the trigger, and get ready for the disrupters still to come.

3. Changing Consumer Behavior is a Given: Your customers are going to continue to drive the engagement and the pace will be exhilarating. Be the company that lives up to its expectations and engage your customers in the digital channels they want, and with the personalization, empathy and transparency they demand.

4. There is a People Revolution: Expect your future workforce to be radically different. Today's employees have changed the game with regard to what attracts them to a company, what motivates their peak performance, and what makes them stay and grow with you. Come up with the right game plan to ensure you have the talent in place that will propel your customer experience to the next level.

5. You Still Have to be “All That”: Amidst all the disruption, the innovation, and consumer upheaval comes the unabated demand for you and your team to be operationally efficient and effective. Plan for the “must have” people, process, and technology you need in order to meet the expectations placed on you by senior management.

AN INTERACTIVE EXPERIENCE LIKE NO OTHER...

Collaborate, Collaborate, Collaborate: Engage in strategic conversations with customer care and experience executives, guaranteed to generate new ideas!

Relax, Have Fun and Make New Friends: Keep your contact list building and engines at high rev, while enjoying over a dozen unique networking events!

Take Control of Your Outsourcing Strategy: Stop by the Sourcing Clinic where top-level outsourcing analysts, subject-matter experts and savvy providers will share best practices and lessons learned in leveraging outsourcing for innovation and transformation.

See for Yourself: Join us for a customer contact center tour and see how others do it, and do it well!

LOCATION, LOCATION, LOCATION ...

This year’s venue:

JW Marriott Starr Pass Tucson Resort & Spa

Nestled against the saguaro-covered foothills of Tucson Mountain Park, JW Marriott Starr Pass Tucson Resort & Spa offers a tranquil yet animated mountaintop setting as natural as the surrounding desert itself.

EXECUTIVE PROFILE

Executive (Vice President, Director)

I2TH ANNUAL CUSTOMER CONTACT, WEST EXECUTIVE MINDXCHANGE ADVISORY BOARD

An Event Shaped by a Community of Your Peers!

Frost & Sullivan extends its appreciation to the following Advisory Board Members for their expertise and valuable support in ensuring the agenda delivers relevant and valuable content.

Pierre Aube
Chief Operating Officer
TekSavvy

Philip Bennett
Vice President, Customer Experience
Insureon

Jeff Chiapelli
Director of Customer Service
American Modern Insurance Group

Angela Colbert
Vice President, Billing Center Operations
Apria Healthcare

Jeremy Ellis
Director, Operations Experian

Lorianne Feltz
Senior Vice President, Customer Service Erie Insurance

Nancy Fratzke
Vice President, Customer Service U.S. Cellular

Regan Heckethorn
Director, Call Center/Customer Care Operations Allegiant Air

Jim LeMere
Director, Integrated Client and Field Services Northwestern Mutual

Roger Paulson
Practice Director, Customer Service, E-Business Consortium University of Wisconsin - Madison

Steve Schneider
Executive Director, Service Operations Aetna

Scott Swift
Director, Customer Service Cree

Mary Horvath
Director of Call Center Operations StubHub

WHO YOU WILL NETWORK WITH

Join our growing community of customer contact, customer experience, and operations executives seeking and sharing new ideas and creative approaches to common challenges. Network with Vice Presidents, Directors and Senior Managers of:

- Call Centers
- Contact Centers
- Customer Analytics
- Customer Care
- Customer Contact
- Customer Experience
- Customer Satisfaction and Loyalty
- Customer Service
- Customer Strategy
- Customer Support
- Operations
- Quality Assurance
- Sales & Marketing

MORE CONTENT THAN ONE PERSON CAN HANDLE

91% of surveyed participants recommend sending 2 or more team members based on the amount of networking opportunities and range of content being delivered.
CHOOSE BETWEEN SIX DIFFERENT COLLABORATION ZONES

Customize your agenda! Stay the course with one zone or bounce around to others. All collaboration zones are Power-Point Free, participant-driven discussions featuring creative thinking and idea generation.

Zone 1. Keeping Pace with Customer Dynamics  |  Zone 2. Enhancing Operational Efficiency and Effectiveness  |  Zone 3. Evolving Channels of Engagement


Schedule-at-a-glance is preliminary and will be updated as information becomes available.

SATURDAY, OCTOBER 22, 2016
ARRIVAL DAY
7:00pm  Suggested Arrival Time
Arrive Saturday to participate in Sunday’s Networking Activities

SUNDAY, OCTOBER 23, 2016
NETWORKING DAY
Bring plenty of business cards, relax, meet-and-greet during this fun-filled day devoted to making new contacts and new friends. For all afternoon & evening orientations, the dress code is business casual.

7:00am  Networking Golf Scramble - Check-In
10:00am  Tucson Food Tour & Networking Challenge - Check-In
3:15pm  Sponsor Workshop
4:45pm  Sponsor Registration & Orientation Reception
6:00pm  Speaker & Thought Leader Orientation
6:45pm  Participant Meet ‘n’ Greet
This end-user/participant activity is your opportunity to identify right out of the gate – those peers who share challenges similar to your own. It’s a great way to find participants who have thought leadership you can benefit from and to facilitate later dialogues throughout the event.

7:30pm  Cocktails in the Canyon Kickoff Reception

MONDAY, OCTOBER 24, 2016
GENERAL SESSION AND EXHIBITION
7:30am  Registration, Continental Breakfast, and Exhibition
8:00am  Welcome and KEYNOTE – Satisfying the Customer: A Failed Strategy
9:20am  CXO INSIGHTS – “My Best Advice” from a Seasoned Chief Customer Experience Officer
9:50am  Networking, Refreshment, and Exhibition Break

10:20am  CONCURRENT COLLABORATION ZONES - Fireside Chats
Fireside Chats are informal conversations that draw upon the experience and expertise of the featured executive and/or use case.

Choose one of the following zones:

Zone 1. How TriWest Eliminated Call Center Conflict with Chemistry: Applying the Power of Personality Science to Agent and Supervisor Relationships

Zone 2. Get Your Priorities Straight: How Zag Bank Structures KPIs to Drive the Overall Customer Experience

Zone 3. Fidelity Investments: Seamlessly Integrating Chat in the Omni Channel Journey

Zone 4. Real-Time, Omni Channel Context: Delivering Desired Customer Outcomes

Zone 5. Deploying New Contact Center Technology: Sure-fire Ways to Reduce Risk, Manage Costs, and Ensure Success

Zone 6. Hiring Smart: Recruiting for Customer Centricity

11:15am  Session to Session Travel Time

11:20am  CONCURRENT SESSIONS – Choose one of the following concurrent sessions:

INTERACTIVE – Solutions Wheel
Play the “wheel” to find out which of the industry’s products and services will help you solve your challenges. It is a series of rapid fire, one-on-one meetings with leading solution providers – both intense and fulfilling.

(OR)

FROST & SULLIVAN VISIONARY INSIGHT – Game Changing Technologies on the Horizon

– FOLLOWED BY –

PARTICIPANT MEET-UPS – Keep your networking engines revving! Participants will gather by industry, business model, and contact center size for hosted conversation on shared dynamics

12:35pm  Food For Thought – Networking Roundtables Hosted by Industry Leaders
Practitioners and Solution Providers host a menu of luncheon discussions on pertinent industry issues. Dine and dish with industry experts. The list of discussion topics will be available on-site.

1:40pm  Session to Session Travel Time

1:45pm  CONCURRENT COLLABORATION ZONES - Roundtables
Roundtable sessions capture the power of all participants’ voices, insights and experiences via group discussion and exploration of the issue at hand.

Choose one of the following zones:

Zone 1. Increasing Customer Retention: Advancing from Proactive to Preemptive Customer Service


Zone 3. Text is the New Talk: Use Cases for Engaging Millennials-Minded Consumers

Zone 4. Measuring and Managing the Omni Channel Agent Experience

Zone 5. The Mastery and De-mystification of Workforce Management

Zone 6. Personalizing the Employee Experience: Sustainable Engagement Strategies

3:10pm  Networking, Refreshment, and Exhibition Break

3:40pm  CONCURRENT SESSIONS – Choose one of the following concurrent sessions:

INTERACTIVE – Solutions Wheel
Play the “wheel” to find out which of the industry’s products and services will help you solve your challenges. It is a series of rapid fire, one-on-one meetings with leading solution providers – both intense and fulfilling.

(OR)

THE FIX – Crowdsourcing Tactical Solutions to Our Most Vexing Challenges

4:35pm  Session to Session Travel Time

5:00pm  SUCCESS STORY – The Cablevision Story: Winning in the Market with Customer Service

5:30pm  Four Truths and a Lie Networking Reception

TUESDAY, OCTOBER 25, 2016
GENERAL SESSION AND EXHIBITION
6:15am  Early Risers Run/Walk
8:00am  Continental Breakfast and Exhibition
8:45am  Ice Breaker and KEYNOTE – The Secret Sauce: Empathetic and Engaged Agents
9:45am  Frost & Sullivan Customer Contact Executive MindXchange Advisory Board and Member Recognition
9:55am  Ask the Experts! Panel Discussion: Innovating the Customer Experience Across the Organization

10:50am  Networking, Refreshment, and Exhibition Break

11:20am  CONCURRENT COLLABORATION ZONES - Peer Councils
Peer Council sessions are participant-driven discussions focusing on your key challenges and concerns.

Choose one of the following zones:

Zone 1. Strategic Thinkers Only: A Forum for Seasoned Customer Contact Executives

Zone 2. Overcoming Your Legacy Constraints

Zone 3. Contact Center Optimization on a Shoestring


Zone 5. Living the Day to Day: A Forum for Center Contact Operations Managers

12:15pm  Food For Thought – Networking Roundtables Hosted by Industry Leaders
Practitioners and Solution Providers host a menu of luncheon discussions on pertinent industry issues. Dine and dish with industry experts. The list of discussion topics will be available on-site.

1:25pm  Session to Session Travel Time
**Choose Between Six Different Collaboration Zones**

Customize your agenda! Stay the course with one zone or bounce around to others. All collaboration zones are Power-Point Free, participant-driven discussions featuring creative thinking and idea generation.

Zone 1. Keeping Pace with Customer Dynamics  
Zone 2. Enhancing Operational Efficiency and Effectiveness  
Zone 3. Seizing the Micro Moment: Optimizing Customer Experience and Support in Every Engagement  
Zone 4. Omni Channel is Like Teenage Dating: It Starts with a KISS (Keep It Simple Stupid)  
Zone 5. Developing a Customer Experience Ecosystem: Best Practices for Bridging the Universe of Technology Solutions  
Zone 6. Building Powerful Front Line Talent

**Tuesday, October 25, 2016 Continued...**

1:30pm  **Concurrent Collaboration Zones: ThinkTanks**  
ThinkTank sessions employ interactive team exercises in a “roll up your sleeves” learning environment.

Choose one of the following zones:

- **Zone 1.** Customer Experience Innovation: Finding Opportunity in Disruption  
- **Zone 2.** Helping Employees Reach their Full Potential at Work and in Life: What’s Good for People is Good for Business  
- **Zone 3.** Seizing the Micro Moment: Optimizing Customer Experience and Support in Every Engagement  
- **Zone 4.** Omni Channel is Like Teenage Dating: It Starts with a KISS (Keep It Simple Stupid)  
- **Zone 5.** Developing a Customer Experience Ecosystem: Best Practices for Bridging the Universe of Technology Solutions

3:00pm  **Networking, Refreshment, and Exhibition Break**

3:30pm  **Concurrent Sessions and The Sourcing Clinic –**
Choose one of the following concurrent sessions OR participate in The Sourcing Clinic:

- **Case History** – Empowering the Agent to Do the Right Thing for the Customer
- **Leadership Insight** – Coaching the Coaches
- THE SOURCING CLINIC – The A-Zs of Transforming How You Deliver Customer Care

4:15pm  **Session to Session Travel Time**

4:20pm  **Concurrent Collaboration Zones: Best Practices**  
Best Practice sessions examine a real world use case, dissect the best practices employed, and explore how to apply them to your own initiative and company.

Choose one of the following zones:

- **Zone 1.** Personalized Touch: Driving Loyalty through Deeper Customer Engagement
- **Zone 2.** Leveraging Voice of the Customer for Change - Reactive to Proactive Data, Insights and Actions
- **Zone 3.** Satisfying the Customer's Channel Preferences: Meeting Them Where They Want and Making it Effortless
- **Zone 4.** HOW Dell Leverages Analytics to Raise the Bar on Omni Channel Customer Engagement

5:20pm  **Concurrent Collaboration Zones Conclude**

5:45pm  **12th Annual Customer Contact Wild West Olympics & Cookout**

**Wednesday, October 26, 2016**

**General Session & Exhibition**

**Customer Service Excellence Recognition Breakfast Bash and Exhibition**

8:30am  **Mingle over Mimosas**

9:00am  **Customer Service Excellence Recognition Ceremony and Breakfast Reception**

9:45am  **Keynote – Engaging with the Consumer of the Future: The Next Wave of Innovation**

10:30am  **Networking, Refreshment, and Exhibition Break**

11:00am  **Panel Discussion – Transform Your Customer Engagement Strategy: Best Practices in Omnichannel, Mobile, Social, Analytics and Web**  
Join us as the winners of the 2016 Customer Service Excellence Recognition Program are unveiled and their success stories are brought to life in a series of live interviews.

11:30am  **Insights and Idea Roundup – Implementing the Best, Brightest and Boldest Ideas from the Program**

12:00pm  **Capstone Keynote – Evite’s Journey to Customer Centricity**

12:30pm  **Content for the 12th Annual Customer Contact, West: A Frost & Sullivan Executive MindXchange Concludes**

**Intuit Site Tour and Executive Roundtable**

1:00pm  **Intuit Site Tour** – Shuttle Check In  
Lunch will be provided.

3:30pm  **Customer Engagement Leadership Council Executive Roundtable**

4:30pm  **Intuit Site Tour and Executive Roundtable Conclude** (Shuttle Transportation to JW Marriott Starr Pass)

**Group Packages**

91% of surveyed participants recommended sending 2 or MORE executives!

Contact us today to learn about the savings and benefits you can receive and be sure to ask about our Team Experience Program.

For more information, please contact: Matthew McSweegan at 516-255-3812, or email him at Matthew.McSweegan@frost.com
**KEYNOTES**

**Engaging with the Consumer of the Future: The Next Wave of Innovation**

**Brian David Johnson**  
Futurist in Residence Center for Science and the Imagination  
Arizona State University

As a futurist, Brian David Johnson works with organizations to develop an actionable 10 - 15 year vision and what it will feel like to live in the future. His work is called futurecasting, using ethnographic field studies, technology research, cultural history, trend data, global interviews and even science fiction to provide a pragmatic roadmap of the future. Johnson is currently the futurist in residence at Arizona State University’s Center for Science and the Imagination and a professor in the School for the Future of Innovation in Society.

**Satisfying the Customer: A Failed Strategy**

**James Lloyd**  
Irate Customer Handler and Humorist  
9 Screens International

For the past forty years, James Lloyd has captivated and inspired audiences on five different continents (still waiting for South America and Antarctica). Blue Cross of California, and a dozen other insurance companies have hired him to transform their cultures. The DMV in Virginia hired him because of numerous complaints of poor service and low morale. Now customers are still waiting in lines, but now they are offered a bottle of water and a smile. His favorite quote is “A positive attitude may not solve all your problems, but it will annoy enough people to make it worth the effort.”

**The Secret Sauce: Empathetic and Engaged Agents!**

**Jeffrey VanDeVelde**  
Senior Vice President & Director, Insights and Client Experience  
SunTrust Bank

Jeff is one of the leading innovators in understanding consumer behavior and applying this knowledge to help organizations drive the changes necessary to create more loyal and engaged customers and employees. In his current role with SunTrust Bank, Jeff is Senior Vice President, Director of Client Insights and Experience, Jeff applies emerging customer experience disciplines combined with advanced behaviors analytics to uncover strategies for improving customer relationship and driving revenue at SunTrust.

**Evite’s Journey to Customer Centricity**

**Victor Cho**  
Chief Executive Officer  
Evite

Since joining Evite as CEO in June 2014, Victor Cho has re-directed the popular brand into a customer-obsessed company focused on bringing people together face to face. He has achieved revenue growth well in the double digits and taken the company into exciting new ventures, including instant-gifting, donations for nonprofits, video, and sponsored content. A passionate consumer advocate, Victor has a long history of reinventing online consumer products and businesses across a wide range of industries, including community (iVillage), financial services (Intuit), photo sharing (Ofoto/Kodak Gallery), expertise networks (AskMe), and more.

**MASTER OF CEREMONIES**

**Patrick Nugent**  
Vice President  
Frost & Sullivan

Patrick Nugent recently joined the Frost & Sullivan Growth, Innovation and Leadership (GIL) team as a Vice President. He has proudly been a part of the Frost & Sullivan events team for the last 15 years. In his role with the Frost & Sullivan events team, he has served as an event facilitator and as Master of Ceremonies. Prior to joining Frost & Sullivan, Patrick was the Director of Business Development for the Illinois Institute for Continuing Legal Education in Chicago.
SUNDAY, OCTOBER 23, 2016

Networking Golf Scramble | 7:30am
This team versus team tournament is perfect for any level of golfing expertise. We welcome and encourage all levels to register for a great day of competition and conversation. Lunch and transportation are included.
Location: Meet in Hotel Lobby
Participant fee: $95

Tucson Food Tour & Networking Challenge | 10:00am
Join us for a memorable food tasting experience through the second largest city in Arizona! We'll visit restaurants that are off-the-beaten-path and offer some of the most creative dishes you'll ever have.
Location: Meet in Hotel Lobby
Participant fee: $95

Participant Meet ‘n’ Greet | 6:45pm
This end-user/practitioner networking activity is your opportunity to identify peers who share challenges similar to yours and facilitate dialogue throughout the event.

Cocktails in the Canyon Kickoff Reception | 7:30pm
Meet your fellow peers and enjoy conversation & cocktails, in the canyon, as we get excited for the days ahead!

MONDAY, OCTOBER 24, 2016

Four Truths and a Lie Networking Reception | 5:30pm
Enjoy playing detective, while deciphering the truths from the lies!

TUESDAY, OCTOBER 25, 2016

Early Risers Run/Walk | 6:15am
Lace up your sneakers and get your endorphins flowing with a little exercise. It’s the perfect start to a great day of content and networking!

12th Annual Customer Contact Wild West Olympics & Cookout | 5:45pm
Gear up for a night of Olympic games with Western flair. Dinner will be served throughout the night and our top teams will be draped in Gold, Silver & Bronze, YEEHAW! Buck up and show us your wild west side!

WEDNESDAY, OCTOBER 26, 2016

Mingle Over Mimosas and Customer Service Recognition Ceremony and Breakfast Reception | 8:30am
Join us in toasting customer engagement excellence as we kick off the 2016 Customer Service Excellence Recognition Program! Start your morning off with a fresh mimosa in hand as you witness the announcement of our best in class honorees, revealed for the first time at this sit-down breakfast.
**SATURDAY, OCTOBER 22 - MONDAY, OCTOBER 24, 2016**

### GENERAL SESSION & EXHIBITION

**7:30am**  
Registration, Continental Breakfast, and Exhibit

Did you remember to pack your breakfast? Make sure you’re down in time for breakfast and registration to get your event materials now!  
Already have your badge? Make sure you pick up your event packet and start networking right away.

**Registration Items**
Hosted by:

*Featured Demonstration*
Hosted by:

**Welcome and KEYNOTE**

**8:00am**  
Satisfying the Customer: A Failed Strategy

James Lloyd  
Irate Customer Handler & Humorist  
9 Screens

In this morning kickoff session, James shares his most effective service techniques, and offers insight into these questions: Why is “satisfying a customer” a bad idea? What service ingredient is necessary to produce loyal customers? What is the number one reason customers defect?  
Bonus: This dynamic session will enhance interactions with both our internal and external customers, as well as with our relationships outside of work!

**Key Take-Aways:**

- Insight on the single most calibrated system of judging customer service
- Guide to the three proven words and phrases guaranteed to annoy customers
- Case study: Lessons learned from a customer service transformation at a 2000 employee call center

**CXO INSIGHTS**

**9:20am**  
“My Best Advice” from a Seasoned Customer Experience Officer

Vicki Jones  
Senior Vice President, AT&T Entertainment Group and Consumer Mobility Support  
AT&T Services, Inc.

How do you keep customers happy and maintain an effortless customer experience while trying to merge two large companies (and three sizeable organizations)? Vicki Jones will discuss how AT&T remained focused on providing an effortless and integrated customer experience throughout its merger with DIRECTV.

**Key Take-Aways:**

- Tips on how AT&T is working to deliver simplified, integrated experiences
- Tools that AT&T implemented to improve the customer experience
- Customer-centric policies that will help us deliver on this commitment

**9:50am**  
Networking, Refreshment, and Exhibition Break

*Featured Demonstration*  
Hosted by:

**CHOOSE BETWEEN SIX DIFFERENT COLLABORATION ZONES**

Customize Your Agenda! Stay the course with one zone or bounce around to others. All collaboration zones are Power-Point free, participant-driven discussions featuring creative thinking and idea generation.

- **Zone 1.** Keeping Pace with Customer Dynamics
- **Zone 2.** Enhancing Operational Efficiency and Effectiveness
- **Zone 3.** Evolving Channels of Engagement
- **Zone 4.** Omni Channel Experience Excellence
- **Zone 5.** Enabling Technologies
- **Zone 6.** Building Powerful Front Line Talent

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**SATURDAY, OCTOBER 22, 2016**

### SUGGESTED ARRIVAL TIME

7:00pm  
Suggested Arrival Time

Arrive Saturday to participate in Sunday’s Networking Activity

### ATTIRE RECOMMENDATIONS KEY

- Casual - Jeans, T-shirt, Comfortable Shoes
- Business Casual - Button-Down Shirt, Trousers, Tie Optional, Dress
- Western Flair - Jeans, Cowboy Boots & Hats (Please bring your sneakers if you plan to participate in the Olympic Games)
- Athletic Gear - Workout Clothing, Sneakers

**MONDAY, OCTOBER 24, 2016**

### NETWORKING DAY

Bring plenty of business cards, relax, meet-and-greet during this fun-filled day devoted to making new contacts and new friends. For all afternoon & evening orientations, the dress code is business casual.

**7:00am**  
Networking Golf Scramble - Check-In

Meet in Hotel Lobby

Join us for this shotgun start, golf scramble (best ball) tournament. This team versus team tournament is perfect for any level of golfing expertise. We welcome and encourage all levels to register for a great day of competition and conversation. Lunch and transportation are included.

**Participant Fee:** $95  
**Hosted by:**

**10:00am**  
Tucson Food Tour & Networking Challenge - Check-In

Meet in Hotel Lobby

Join us for a memorable food tasting experience through the second largest city in Arizona! We’ll visit restaurants that are off-the-beaten-path and offer some of the most creative dishes you’ll ever have. Tell your tastebuds to get ready, this adventure will be one for the record books.

**Participant Fee:** $95  
**Hosted by:**

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**SUNDAY, OCTOBER 23, 2016**

### NETWORKING DAY

- **8:00am**  
  Sponsor Workshops
- **4:45pm**  
  Sponsor Registration & Orientation Reception
- **3:15pm**  
  Sponsor Workshops
- **4:45pm**  
  Sponsor Registration & Orientation Reception
- **3:15pm**  
  Sponsor Workshops

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**FROST & SULLIVAN**

**SATURDAY, OCTOBER 22 - MONDAY, OCTOBER 24, 2016**

Join Our Customer Contact LinkedIn Community  
www.frost.com/linkedincc

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**Register Now.**  
events.us@frost.com  
tel: 1.877.GO FROST (1.877.463.7678)  
fax: 1.888.674.3329  
www.frost.com/ccw

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Past Participants from the Financial Services Industry

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Zone 1. How TriWest Eliminated Call Center Conflict with Chemistry: Applying the Power of Personality Science to Agent and Supervisor Relationships

Fireside Chat with:
- Carmelle Sibley, Director, Operations Support, TriWest
- Andy Solem, Senior Director, Learning and Engagement, Mattersight

Key Take-Aways:
- Guide to the six personality styles, their core needs and drivers, and the language clues that identify and decode each one
- Best practices on how personality-based training can fundamentally shift the call center culture
- Insight on how personality understanding can defuse conflict, build confidence, and strengthen individual and team performance

Zone 2. Get Your Priorities Straight: How Zag Bank Structures KPIs to Drive the Overall Customer Experience

Fireside Chat with:
- Hadley MacDonald, Director, Client Experience, Zag Bank
- Giuseppe Ficarra, Director, Global Sales, Arvato

Key Take-Aways:
- Insights on how to choose the right data to focus on improving customer service
- Strategies to collect and leverage your customer feedback to help choose the right KPIs
- Guide on managing your chosen KPIs on the production floor to improve your customers’ experience

Zone 3. Fidelity Investments: Seamlessly Integrating Chat in the Omni Channel Journey

Fireside Chat with:
- Kimberly Petrosso, Head of Product Management & Prioritization, Fidelity Investments

Key Take-Aways:
- Insight on how to offer personalized chat integrated with your other channels
- Guide to how chat can be implemented at scale with a leading financial institution
- Lessons learned on how to be a digital disruptor versus being disrupted in today's work of digital disruption

Zone 4. Real-Time, Omni Channel Context Delivers Desired Outcomes

Fireside Chat with:
- Tony Mihalak, Senior Director, Customer Experience, Comcast
- Chad Hendren, Vice President of Solutions Innovation, VHT

Key Take-Aways:
- Blueprint for defining and measuring a successful customer experience
- Best practices for offering a truly omni channel customer experience
- Guide to balancing customer experience goals with operational realities
Zone 5. Deploying New Contact Center Technology: Sure-fire Ways to Reduce Risk, Manage Costs, and Ensure Success

FIRESIDE CHAT WITH:
Jason Wolkove
Director of Strategic Initiatives, Enterprise Technologies
Scotiabank
Terry Pirovolakis
Solutions Architect, Contact Center Technologies
Scotiabank
MODERATOR:
John Craighill
Client Advocate
Empirix

Research shows 66% of technology projects suffer cost overruns, 33% miss their intended timelines and 17% of them threaten the profitability and existence of the company. Join us in this interactive session and learn how to stop making the same mistakes.

Key Take-Aways:
- Blueprint for ensuring success by managing towards business objectives and not budget and timeline by securing critical internal and external talent to accomplish the vision
- Guide to managing cost by carving up big projects into smaller 4-8 week projects that cumulate into an overall business strategy
- Tips and tricks for reducing risk by including rigorous quality checks and automation that require sign-off from stakeholders, focused on customer experience and business outcome

Zone 6. Hiring Smart: Recruiting for Customer Centricity

FIRESIDE CHAT WITH:
Bibi Brown
Vice President, Operations
1-800-Flowers.com
MODERATOR:
Mark Belcher
Vice President, Client Relationships
SPI Global

Regardless of industry or market focus, today’s businesses face a major challenge in attracting, hiring, and retaining talent. Hiring the best talent presents an opportunity to examine ways in which companies recruit and interview. One effective approach is pre-hire staging, which occurs between offer acceptance and start date, to provide candidates to hear first-hand the things that they can look forward to when they start working as well as the challenges that they might encounter along the way. Employer and employee clearly communicate expectations. Introducing this HR touch point reduces the number of no-shows while eliminating at risk candidates in the recruitment stage.

Key Take-Aways:
- Insights into developing a toolkit for more effective strategic hiring
- Action step: adding a step up front can lead to fewer downstream hiring mistakes
- Fresh perspectives on employee engagement

11:15am Session to Session Travel Time

CONCURRENT SESSIONS
11:20am Choose one of the following concurrent sessions:

INTERACTIVE – Solutions Wheel
Play the “wheel” to find out which of the industry’s products and services will help you solve your challenges. It is a series of rapid fire, one-on-one meetings with leading solution providers – both intense and fulfilling.

OR

Frost & Sullivan Visionary Insight – Game Changing Technologies on the Horizon

Stephen Loynd
Global Program Director, Digital Transformation Group, Customer Contact Frost & Sullivan

What is on the technology horizon for Customer Engagement as it undergoes its own form of digital transformation? What should organizations consider that they may not know is coming? Enterprises and vendors alike have much to consider in 2016. This session will be examining themes such as:

- The role of exponential technology in customer engagement
- How intelligence is increasing the effectiveness of tools such as messaging apps
- How advanced sensors, imaging, and gamification will help deliver immersive customer experiences going forward

Key Take-Aways:
- What’s the next thing in Customer Engagement? What’s visionary?
- What is beyond the Internet of Things?
- How should companies be repositioning for the future?

– FOLLOWED BY –
Participant Meet-Ups
Keep your networking engines revving! Participants will gather by industry, business model, and contact center size for hosted conversations on shared dynamics.

12:35pm Food for Thought – Networking Roundtables
Hosted by Industry Leaders
Practitioners and solution providers host a menu of luncheon discussions on pertinent industry issues. Dine and dish with industry experts. The list of discussion topics will be available on-site.

1:40pm Session to Session Travel Time
CONCURRENT COLLABORATION ZONES – Roundtables
1:45pm Roundtable captures the power of all participants voices, insights and experiences via group discussion and exploration of the issues at hand.

Choose one of the following zones:

**Zone 1. Increasing Customer Retention: Advancing from Proactive to Preemptive Customer Service**

**FACILITATOR:**
Jeff Foley
Director of Product Marketing for Customer Service Applications
Pegasystems

To meet rising customer expectations, organizations are already moving from reactive to proactive customer service. The leaders in customer loyalty, however, will know their individual customers so well that they can preemptively solve for a problem even before the customer realizes they have one. How can you better anticipate customer needs? Join us for an interactive session to learn how you can use your customer data to reduce propensity to call without sacrificing the customer experience.

Key Take-Aways:
- Real-world examples of reactive, proactive, and preemptive customer service
- Insight on the use of predictive and adaptive analytics to predict the next best action
- Proven quick wins for improving retention, personalizing interactions, and moving up to preemptive service


**CO-FACILITATORS:**
Tom Aiello
Senior Vice President of Sales
Cicero

Neil Crane
Director of Product Strategy
Cicero

Don’t have budget to change technology? There are still things you can do with what you have. Can’t get all new people? There are some tricks and techniques to maximize their throughput. Processes and compliance too difficult? There are steps you can take to meet requirements and add value. Join this interactive session to share best practices and identify at least 15 action steps to streamline operations by maximizing the use of people, processes and technology.

Key Take-Aways:
- Insight on how to identify areas for operational improvement
- Ideas on leveraging and maximizing existing resources to achieve more
- Action steps that you can take to drive change in customer service

**Zone 3. Text is the New Talk: Use Cases for Engaging Millennial-Minded Consumers**

**CO-FACILITATORS:**
Linda Carter
Vice President, Customer Care
Overstock.com

Abhay Prasad
Senior Director, Cloud Solutions
Aspect

Research shows that Millennials, and those with a “Millennial Mindset,” like self-service, but would prefer text to execute tasks they have traditionally (and mostly unhappily) accomplished through an Interactive Voice Response (IVR) system. It’s possible with Interactive Text Response (ITR). ITR is an intelligent chatbot that uses Natural Language Understanding to enable people to engage in personalized, conversational text interactions with an automated system. Simply ask a question and get an answer. Join us for an interactive discussion on the concept, best practices, and use cases for ITR.

Key Take-Aways:
- Guide to what’s driving chatbot adoption
- Best practices that are critical for successful deployment of ITR
- Tips and tricks for quantifying the potential benefits of ITR

**Zone 4. Measuring and Managing the Omni Channel Agent Experience**

**FACILITATOR:**
Stephen Bengston
Senior Vice President & General Manager
Arise Virtual Solutions

Multi-channel is not omni-channel. Successful strategies for dealing with customer interactions have evolved over three decades, but many organizations do not have the ability to provide similar control over new media channels such as email, chat or SMS. Key to an omni channel strategy is to be able to provide consistency for all interactions types, understands enterprise customer value holistically, and that consistency starts at how you measure and manage your agents internally who are providing your assisted service.

Key Take-Aways:
- Insight on the key elements of an omni channel strategy that simplify management
- Best practices for measuring performance consistently across channels
- Guide to future proofing your management toolkit for new channels

**Zone 5. The Mastery and De-Mystification of Workforce Management**

**FACILITATOR:**
Barry Knack
Manager of Professional Services
inContact

Let’s take a walk through the wild world of workforce management! Join our interactive session focusing on the challenges of your ever-changing, dynamic, and unique situation - that is just like everyone else’s! Learn from your peer’s successes and failures, and hammer out a strategy that will work for your business.

Key Take-Aways:
- Guide to resource planning for dynamic environments
- Insight on how to make time for coaching, meetings, and still meet SLAs
- Best practices for understanding the numbers game – headcount, shrinkage, adherence, and more
- Applicable strategies for the “New Generation” employees

**Zone 6. Personalizing the Employee Experience: Sustainable Engagement Strategies**

**FACILITATOR:**
Jay Urbiztondo
Director of Employee Experience
24-7 Intouch

Creating positive experiences doesn’t stop with just your customers. You also need to create the same experiences for your employees throughout their journey with your company. The entire employee experience involves multiple drivers that have different impacts, which together influence engagement and motivation. It’s not about doing more, but instead doing things differently that align effort and purpose. Join us to explore strategies that will help you personalize the employee experience and deliver lasting impact to meaningful engagement.

Key Take-Aways:
- Insight on the importance of creating positive first impressions and their lasting impact on your employees’ mindsets
- A roadmap for analyzing employee experiences and determining key areas of opportunity for your business
- Blueprint on how to report on the impact of employee experience and engagement efforts

3:10pm Networking, Refreshment and Exhibition Break

**Featured Demonstration**
Hosted by: [Cicero](#)

Past Participants from the Healthcare Industry
CONCURRENT SESSIONS

3:40pm Choose one of the following concurrent sessions:

INTERACTIVE – Solutions Wheel
Play the “wheel” to find out which of the industry’s products and services will help you solve your challenges. It is a series of rapid fire, one-on-one meetings with leading solutions providers – both intense and fulfilling.

OR

THE FIX – Crowdsourcing Tactical Solutions to Our Most Vexing Challenges
Share your smarts! Choose between eight themed brainstorming sessions and crowdsource solutions to the most vexing challenges facing customer experience and customer contact today. These are twenty minute rapid fire sessions with four rotations. First come, first serve, so choose wisely! Each brainstorm group will build upon the other to build a list of readily operationalized ideas to these common challenges.

Choose one topic for each of the four rotations:

The Fix on Increasing First Call Resolution
The Fix on Improving Agent Retention
The Fix on Onboarding
The Fix on Knowledge Management
The Fix on Social Media Excellence
The Fix on Change Management
The Fix on Customer Survey Design
The Fix on Agent Training

4:55pm Session to Session Travel Time

SUCCESS STORY

5:00pm The Cablevision Story: Winning in the Market with Customer Service
Rob Comstock
Executive Vice President, Operations
Cablevision

Is it possible to achieve higher customer satisfaction and loyalty while reducing cost driving customer interactions? Will greater reliability, predictability of service and reduced customer effort lead to improved customer tenure and promotion of your product or service? More and more, particularly for mature industries, improving profitability through cost reduction can lead to eroded service and loss in market share. The good news is growth in customers and revenue while reducing operating costs is possible.

Key Take-Aways:

- Guide to identifying ways to drive greater reliability and reduced customer effort
- Best practices for understanding the cultural implications of a shift to greater customer focus
- Key tools to measure progress and align the organization
- Blueprints for designing the infrastructure to support a transformation

5:30pm Four Truths and a Lie Networking Reception

Enjoy playing detective, while deciphering the truths from the lies! Guess correctly and you will be entered to win a fantastic prize.

TUESDAY, OCTOBER 25, 2016

6:15am Early Risers Run/Walk
Calling all walkers, joggers and runners! Lace up your sneakers and get your endorphins flowing with a little exercise. It’s the perfect start to a great day of content and networking!

8:00am Continental Breakfast and Exhibition

Ice Breaker and KEYNOTE
8:45am The Secret Sauce: Empathetic and Engaged Agents
Jeffrey VanDeVelde
Senior Vice President & Director, Insights and Client Experience
SunTrust: Bank

With more and more interactions happening digitally, it puts more and more pressure on companies to deliver a memorable experience to people when they interact with a human. Research still suggests that consumers are putting high value on human experience even though they are happening less often. These experiences have the opportunity to create greater loyalty and advocacy among specific target audiences. Great brands are architecting these experiences by finding the right people, inspiring them to be great, equipping them with the skills and tools and managing them in a way that gives the person the flexibility to deliver a personalized experience.

Key Take-Aways:

- Best practices on how to find and use your companies’ purpose as the foundation for your human experience strategy
- Proven ways on how to identify the right talent and immerse them into your culture
- Insight on how to sell the concept to the C-suite

9:45am Frost & Sullivan Customer Contact Executive MindXchange Advisory Board and Member Recognition

Past Participants from the Travel & Hospitality Industry
Are the people in your world today bringing new perspectives and sharing insights from other industries?

To stay competitive in your world of customer engagement, spend time with others who have charted the course.

The Customer Engagement Leadership Council by Frost & Sullivan offers a unique opportunity to connect year-round with action takers and forward thinkers from across industries.

Join the Customer Engagement Leadership Council, and:

- Gain best practice learning based on real-world scenarios.
- Build an exclusive, executive network of peers in other industries.
- Develop your executive leadership capabilities.
- Remain a relevant and high-performing leader well into the future.

See Our Founding Members & Inquire about Membership.

Visit www.Frost.com/CELC
Email: Matthew.McSweegan@frost.com
ASK THE EXPERTS! Panel Discussion
9:55am  Innovating the Customer Experience Across the Organization

MODERATOR:
Michael DeSalles
Principal Analyst, Customer Contact
Frost & Sullivan

PANELISTS INCLUDE:
Lisa Bullen-Austin
National Director – 211 Strategic Enhancements and Disaster Recovery
United Way Worldwide

Jennifer Capuchino
Vice President, Customer Care
Black Knight Financial Services

Alexander Hempton
Program Manager, 311 Customer Experience
City of San Diego

Kathy Hutchens
Vice President, Business Development and Patient Engagement
Sharp Rees-Stealy Medical Centers

Diane Magers
Former Customer Experience Executive
AT&T

Cippy Seidler
Director, Consumer Care Center
Banner Health

Customer experience (CX) has emerged as a top strategic priority for businesses, especially as consumers increasingly engage with companies and brands via digital channels–Web, mobile, and social media. Large global brands are investing heavily in digital customer engagement initiatives, to deliver richer and more personalized experiences to customers. And yet, how do educate and inspire the entire organization to believe that customer engagement is an absolute “must” in today’s hyper-competitive business landscape? What techniques, processes, and best practices can be used to encourage your organizational ecosystem to help you innovate and compete more effectively? What future role will the contact center play in engaging and empowering the rank and file to deliver on a consistent experience?

Key Take-Aways:
- Guide to identifying key stakeholders and influencers in “moving the CX needle”
- Tips and tricks for discovering which CX projects to prioritize and how to put customer insight at the center of your universe again
- Insights and new tips—processes, tactics, and newest channels to really optimize the customer experience
- Guide on how to interact effectively with customers that are now more knowledgeable, empowered, and demanding
- Best practices for teaching a diverse employee base (Boomers, Gen X, Gen Y/Millenials, Gen Z/Boomlets) how to manage anxious and impatient customers and improve C-Sat and NPS

10:50am  Networking, Refreshment, and Exhibition Break

Featured Demonstration
Hosted by:
aspect

CONCURRENT COLLABORATION ZONES – Peer Councils
11:20am  Peer Council sessions are participant-driven discussions focusing on your key challenges and concerns.

Choose one of the following zones:

Zone 1.  Strategic Thinkers Only: A Forum for Seasoned Customer Contact Executives

MODERATOR:
Jeffrey VanDeVelde
Senior Vice President, Director of Client Insights and Experience
SunTrust Bank

In today’s digital world, the customer is the director of their own experience. If that is what makes the customer king, then companies are left trying to play a role in those experiences. It is imperative that companies today deliver experiences that hold customers’ attention and lead to the outcomes they seek. Only by putting the customer in the center of your strategy can you find a way to be cast in that lead role for the customer.

Key Take-Aways:
- Framework for companies to assess how customer-centric their organization is
- Best practices for how other companies have work to deliver memorable customer experiences
- Metrics that inform how well you are delivering for the customer

Zone 2.  Overcoming Your Legacy Constraints

MODERATOR:
Steve Ellis
Senior Director, Customer Care
EyeMed

How do you best to integrate new technologies when you must work within the constraints of legacy systems? What are successful approaches to minimize disruption to your business as you navigate this change? How to overcome challenges to the business case. How to get your people ready to support these changes and live with both new and legacy systems? In this interactive session, we will discuss how do you align leaders, middle management and your frontline associates to maximize return on your technology investment.

Key Take-Aways:
- A plan to align leadership with your middle management and front line associates on the system changes
- Insights to recognize potential obstacles to your technology deployment and mitigate risks
- Framework for change management to tie associate readiness to business success

Zone 3.  Contact Center Optimization on a Shoestring

MODERATOR:
Chris Lah
Senior Director, Customer Service and Financial Resources
Cincinnati Children’s Hospital Medical Center

Contact center expenses keeping rising while the budgets kept shrinking! Balancing these financial realities against the needs of your customers requires more than standard processes and strategies. Conquering costs and achieving maximum quality may not be as difficult of a text as you think. In this interactive session, you are the customer as well as the contact center leader. Bring your ideas as well as your questions!

Key Take-Aways:
- Lessons on budget friendly customer engagement practices and software
- Best practices for generating new cross-industry approaches for your staff and operations ...in “Real time”
- Guide to anticipating the potential problems and risks of going “outside the box” with solutions and changes

MODOERATOR:
Ashley Haynes-Gaspar
General Manager, Software & Services
GE Measurement & Control

Industry groups often discuss the differences between B2B and B2C. These are meaningful conversations, however providing customer service when you are in business for business is different. This session draws upon case studies in successful customer support organizations to talk about this important shift and illustrate the best practices they employ to deliver meaningful business outcomes for customers.

Key Take-Aways:
- Blueprint for the key differences between B2B and B2C – and fresh perspectives on why “B4B” matters more
- Guidelines and practical tips to delivering customer outcomes
- Insights to best link customer success managers and technical specialists to customer outcomes

Zone 2. Helping Employees Reach their Full Potential at Work and in Life: What’s Good for People is Good for Business

MODOERATOR:
Abhinav Mathur
Senior Director, Customer Care
Audible Inc.

How do you build a highly engaged workforce that is empowered to continuously improve on behalf of your customers? And do this while sustaining a motivated, fun environment of success, mutual respect and growth? How do you effectively manage constant change in a fast-paced organization? As operations leaders, the challenge of leading a high performing team is exciting, albeit daunting. We must constantly be forward looking and devise smart strategies to raise the bar on performance and change management.

Key Take-Aways:
- Strategy and blueprint for developing and sustaining a high performance culture that inspires, excites and motivates teams
- Insights on strategy and tools for designing, implementing and sustaining a continuous improvement culture
- Best practices on recognizing performance challenges while managing constant change

Zone 3. Customer Experience Innovation: Finding Opportunity in Disruption

MODOERATOR:
Amit Shankardass
Executive Vice President, Marketing
Teleperformance

We live in an era of great digital disruption; from social to mobile, from AI to bots. It can be both a challenge and an opportunity. The game is changing, and we have to change with it. With the right insight and plan it can be a difference maker and empowering. Digital disruption is creating an opportunity to engage with our customers in a deeper more meaningful way. Your customer’s pace of adoption is driving critical changes to your customer engagement technologies, processes, and data management. This session will dive into what are the disruptors, how fast it will happen, agile strategy, how to know when to hit the trigger, and where are the opportunities for customer experience innovation amidst this digital disruption.

Key Take-Aways:
- Guide to the digital disruptors of today, and tomorrow
- Insights into consumer preferences for digital interaction
- Examples of innovation amidst disruption
- New practices for methods of digital consumer engagement
- Best practices for harnessing this digital disruption

Zone 4. Living the Day to Day: A Forum for Contact Center Operation Managers

MODOERATOR:
Abhinav Mathur
Senior Director, Customer Care
Audible Inc.

How do you build a highly engaged workforce that is empowered to continuously improve on behalf of your customers? And do this while sustaining a motivated, fun environment of success, mutual respect and growth? How do you effectively manage constant change in a fast-paced organization? As operations leaders, the challenge of leading a high performing team is exciting, albeit daunting. We must constantly be forward looking and devise smart strategies to raise the bar on performance and change management.

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- Insights on strategy and tools for designing, implementing and sustaining a continuous improvement culture
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Zone 5. Session to Session Travel Time

Join the Conversation...
#CCFrost

Past Participants from the Government & Non Profit Industry
Zone 3. Seizing the Micro Moment: Optimizing Customer Experience and Support in Every Engagement

FACILITATOR:
Akhil Talwar
Senior Product Manager
LogMeIn

Customer experience has always been important, but it’s never been more difficult to achieve. In today’s digital economy, every moment is an opportunity to engage and create a truly memorable experience. Yet businesses struggle to create consistent experiences due to the proliferation of channels and devices, multiple systems and data sources spread across functional groups. Technology is the key to breaking down the traditional silos and uniting data across disparate systems to ultimately deliver on today’s expectations.

Key Take-Aways:
- Proven approaches to creating a seamless experience across pre-sales, service and remote technical support functions
- Techniques for using contextually relevant data to create truly personalized customer experiences
- Insight on empowering agents to deliver fast, efficient, and frictionless service engagement

Zone 4. Omni Channel is Like Teenage Dating: It Starts with a KISS (Keep it Simple Stupid)

FACILITATOR:
Tom Lewis
Chief Executive Officer
SmartAction

Omni channel: everybody is talking about it, everybody wants to do it, but most don’t know what it’s like and are still fumbling around… feels like teenage dating! But, does anyone really know how to build the omni channel experience? And, what are the pitfalls from the all different technologies out there? This interactive session is designed to help both early and late adopters of omni channel journeys to understand holistically what it can mean to their company. We will define what omni channel really means, break down its complexity, and explore how to look at it for your company, especially if you haven’t implemented yet. If you have, we’ll discuss the success of your omni channel experience and ways to measure that success, as well as discuss tangible examples to help you uncover a smoother journey for your customers.

Key Take-Aways:
- A definition of the ultimate omni channel experience, what it looks like, and what benefits it provides in the market
- Guide to what omni channel means for the design of the contact center of the future
- Concrete steps to get your company to the next level of omni channel

Zone 5. Developing a Customer Experience Ecosystem: Best Practices for Bridging the Universe of Technology Solutions

FACILITATOR:
Bob Trent
Customer Experience Design
Verizon

‘GOT RISK!’ All Customer Experience projects do. Many flounder and some fall short of expectations. Join us as we explore how you can mitigate your customer experience project risks, accelerate your customer experience transformation and ensure success with the right ecosystem. In this interactive session, we will discuss everything from how you develop a customer experience strategy to implementation best practices, all the way out to how to measure success.

Key Take-Aways:
- Insight on how to build a customer experience strategy starting with your executives
- Guide to the right technologies to enable your customer experience initiatives
- A 40 year old methodology around customer experience that still ‘holds water’ today

3:00pm Networking, Refreshment, and Exhibition Break

Featured Demonstration
Hosted by: Qinteractions

CONCURRENT SESSIONS and THE SOURCING CLINIC

3:30pm Choose one of the following concurrent sessions OR participate in the Sourcing Clinic:

CASE HISTORY – Empowering the Agent to Do the Right Thing for the Customer

Rob Gofourth
Vice President, Operational Strategy & Performance
BlueCross BlueShield of North Carolina

Does your quality program truly support customer advocacy? Are your agents trying to do the right thing for your customer but the process is keeping them in a box? It’s time to modernize your service quality program and turn your customer service agents into customer advocates through a competency based approach rather than the traditional check list!

Key Take-Aways:
- Guide to designing a plan that will modernize your quality program through enhanced customer and agent interaction
- Insights on the positive impacts around customer and employee satisfaction and engagement
- Template for building a successful new quality program

LEADERSHIP INSIGHTS – Coaching the Coaches

Cecelia MacLellan
Director of Contact Center Operations
Staples

Old school rules of leadership just don’t work with today’s complex workforce. We need to rely on our coaches to do more than just deliver instruction and monitor metrics. We need them to build high performing, independent teams. We need them to innovate and move with speed, sometimes in a world where the closest connection they have to their employee is a chat room or webcast. Join this session for insights on coaching the coaches to elevate performance and create an engaged workforce that can be a differentiator for your business.

Key Take-Aways:
- Six best practices for coaching your leaders
- Framework for developing your coaches to create highly engaged high performing teams
- Tools to measure coaching effectiveness

THE SOURCING CLINIC – The A-Zs of Transforming How You Deliver Customer Care

CO-FACILITATORS:
Michael DeSalles
Principal Analyst, Customer Contact
Frost & Sullivan

Stephen Loynd
Global Program Director
Digital Transformation Group, Customer Contact
Frost & Sullivan

Whether a novice or seasoned expert at outsourcing customer management, we know you face an array of questions. How risky or prudent are various onshore, offshore, and near shore strategies? Can outsourcing providers give you access to educated, ethical, service-oriented, bicultural and bilingual talent at a reasonable price?

Key Take-Aways:
- Guide to strategies involved in deciding what to outsource, when to do it, and where
- Insight on why outsourcers are choosing to locate in specific nearshore geographies
- “On the ground” insights from experienced service providers and well-traveled industry analysts
- Guide to understanding what care activities are best serviced from specific locations (India and the Philippines, for example)
- Examples of real-world successful deployments and expanded engagements

4:15pm Session to Session Travel Time
CONCURRENT COLLABORATION ZONES – Best Practices

4:20pm  Best Practice sessions examine a real world use case, dissect the best practices employed, and explore how to apply them to your own initiative and company.

Choose one of the following zones:

Zone 1. Personalized Touch: Driving Loyalty through Deeper Customer Engagement

CO-FACILITATORS:
Cathy Baldini
Partner and Industry Leader
Concentrix Consulting

Larry Bates
Partner and Customer Experience Consultant
Concentrix Consulting

Providing a personalized touch is revolutionizing the way many organizations are engaging with their customers and prospects. Emerging capabilities are enabling organizations to increasingly “know” their customers, their preferences and needs, and provide a human face to the organization resulting in increased loyalty and improved business outcomes. In this interactive session, we will discuss a thoughtful and proactive approach to designing a personalized customer interaction experience.

Key Take-Aways:
- Blueprint for designing and delivering thoughtful and proactive customer interactions and an exceptional customer experience
- Techniques for developing empathy with the customer to understand how to create a more frictionless experience
- Guide to focusing organizational thinking and collaboration around the customer experience
- Best practices for identifying opportunities for personalization and adding value to every customer interaction.

Zone 2. Leveraging Voice of the Customer for Change – Reactive to Proactive Data, Insights and Actions

FACILITATOR:
Parikshit Kalra (PK)
Solutions and Capabilities Leader
HGS

Are you measuring the right metrics to achieve your business objectives? In this interactive session, we will discuss moving from reactive data, tactical operations management to proactive data and strategic management by aligning your analytics framework to your business need. Each participant will unpack opportunities to evaluate their analytics framework and assess which stage of proactive data management their organization is currently at.

Key Take-Aways:
- Benchmark your approach to determine if you are proactive or reactive in use of analytics
- Best practices on measuring the right metrics
- Guide to identifying opportunities to create action from your insights

Zone 3. Satisfying Your Customer’s Channel Preferences: Meeting Them Where They Want and Making it Effortless

CO-FACILITATORS:
Justin Borah
Director GMS Technology & Product Management
JustFab

Dan Fox
Field Marketing Manager
Interactions

Consumers aren’t just contacting you on the phone any more - voice, chat, texting, outbound and mobile - they want it all. Expectations are high and companies are fighting to be at the forefront of customer experience innovations. In a world of instant gratification and self-service, channel demands are on the rise -- can your company measure up?

Key Take-Aways:
- Customer success story that will provide real examples of how a changing a customer experience strategy revolutionized an organization and its customer relationships
- Blueprint on how innovative companies are managing their multichannel customer care strategy today
- Guide to the state of the customer care industry and how self-service is becoming a necessity

Zone 4. How Dell Leverages Analytics to Raise the Bar on Omni Channel Customer Engagement

CO-FACILITATORS:
Roger Davis
Principal Engineer – Contact Center and AC&C
Dell

Mike Ary
President
Aceyus, Inc.

As you migrate to an omni channel environment, how do you develop insight into how your customers behave and then use this knowledge to your advantage? Come learn how Dell is leveraging analytics to better understand and engage with customers.

Key Take-Aways:
- Insight into how aggregating customer interaction data from multiple platforms and channels can provide a competitive advantage and drive profitability
- Strategies for understanding customer behaviors and what leads to success with specific customer groups
- Approaches for analyzing information to optimize First Contact Resolution (FCR), reduce repeat callers, and improve satisfaction
- Best practices with analytics that improve both efficiency AND effectiveness of operations

5:20pm  Concurrent Collaboration Zones Conclude

5:45pm  The 12th Annual Customer Contact Wild West Olympics & Cookout

Gear up for a night of Olympic games with Western flair. Dinner will be served throughout the night and our top teams will be draped in Gold, Silver & Bronze, YEEHAW! Buck up and show us your wild west side!
8:30am  Mingle Over Mimosas
Join us in toasting customer engagement excellence as we kick off the 2016 Customer Service Excellence Recognition Program! Engage with your fellow participants over mimosas while gearing up for an action-packed morning of content, best practices, and success stories from the winners circle!

9:00am  Customer Service Excellence Recognition Ceremony and Breakfast Reception
Come celebrate the achievements of the prestigious award winners, who are shaping the future of customer service, and are revealed for the first time at this sit-down breakfast! We will give kudos to the game changers and customer service innovators in four unique categories, covering Omni-channel Customer Experience, Web Customer Experience, Social Media Customer Experience and Customer Engagement Analytics.

KEYNOTE
9:45am  Engaging with the Consumer of the Future: The Next Wave of Innovation
Brian David Johnson
Futurist in Residence, Center for Science and the Imagination
Arizona State University
The future isn’t an accident. The future is built everyday by the actions of people, organizations and corporations. But how do we build the future? What are the actionable steps we can take today to imagine, model, communicate and build these visions? In his talk Johnson will explore over-arching trends and even some wild ideas that will impact industry and the human race.

Key Take-Aways:
- A fresh perspective on the technological advances and cultural trends that will affect the future
- Insight on what steps you can take today to start shaping the future
- Techniques for creating an organization that is focused on the future but that also delivers results today

10:30am  Networking, Refreshment, and Exhibition Break

PANEL DISCUSSION
11:00am  Transform Your Customer Engagement Strategy: Best Practices in Omni, Mobile, Social, Analytics and Web
MODERATOR:
Nancy Fatzke
Vice President, Customer Service
U.S. Cellular

PANELISTS INCLUDE:
Mary Horvath
Director of Call Center Operations
StubHub
Michelle Mattson
Director, Social Media Care
T-Mobile
Ken Mirch
Director, Member Services
Dollar Shave Club

Join us as the winners of the 2016 Customer Service Excellence Recognition Program are unveiled and their success stories are brought to life in a series of live interviews.

INSIGHTS AND IDEA ROUNDUP
11:30am  Implementing the Best, Brightest and Boldest Ideas from the Program

PANELISTS INCLUDE:
Philip Bennett
Customer Service Operations Manager
Empire Today
Jeremy Ellis
Director of Operations
Experian
Steve Ellis
Senior Director, Customer Care
EyeMed

Participants at each Customer Contact Executive MindXchange come away with a wealth of key learnings and it can be a challenge to take it all in. During this interactive session, members of the Customer Contact Speaker Faculty and Advisory Board will highlight the most important themes, key take-aways and lessons learned they can be readily operationalized once you are back in the office.

CAPSTONE KEYNOTE
12:00pm  Evite’s Journey to Customer Centricity
Victor Cho
Chief Executive Officer
Evite

Building a truly customer-centric business takes more than just tracking a metric like Net Promoter. You need to modify your people, processes, and technologies to build a hyper-responsive team that not only responds rapidly to customer input but harbors a true passion to build an amazing experience. In this keynote Victor will describe the customer-centricity step changes he has brought to Evite, the world’s #1 online invitation platform, over his first two years at the helm and the tangible results that have followed.

Key Take-Aways:
- 10 steps to take to build true customer-centricity into your business
- Best practices for prioritizing customer vs. revenue-centric initiatives
- Insight on when to use data and when to ignore it
Agenda

Join Our Customer Contact LinkedIn Community www.frost.com/linkedincc

Content for the 12th Annual Customer Contact, West: A Frost & Sullivan Executive MindXchange Concludes

INTUIT SITE TOUR AND EXECUTIVE ROUNDTABLE
1:00pm INTUIT SITE TOUR – Shuttle Check In
Intuit has many teams generating customer insights that are fed back into their core product teams to eliminate customer pain in their offerings. The organization also has teams that do frontline care and sales. Join us on this interactive site visit to showcasing Intuit’s people and dynamic capabilities. Lunch will be provided.

CUSTOMER ENGAGEMENT LEADERSHIP COUNCIL EXECUTIVE ROUNDTABLE
3:30pm

4:30pm Intuit Site Tour and Executive Roundtable Concludes (Shuttle Transportation to the Airport & JW Marriott Starr Pass will be provided)

Mark Your Calendars!

2017 Customer Service Excellence Recognition Program Open for Nominations

Dates to be Announced at the Customer Contact West, Executive MindXchange

It’s not every day that you, your team, and your company receive recognition for your achievements in customer service excellence! This is your chance to see how you stack up against your peers from around the world. And, most importantly, it’s an opportunity to tell your customers, your partners, and the rest of the world about your achievements. Get ready to submit your nomination. Dates to be announced at the Customer Contact West, Executive MindXchange.

For more information visit: www.frost.com/recognition

Additional Not to Miss Customer Contact Executive MindXchange Events

The Customer Engagement Leadership Council is a member-driven, global business leadership network comprised of senior-level executives in customer experience, marketing and customer care. It provides the opportunity for its members to build personal relationships with executive peers from many diverse industries and business disciplines.

The Inaugural Council Meeting will take place virtually in November. Keep your eyes out for our forthcoming invitation!

For More Information on the Customer Engagement Leadership Council, please contact Matt McSweegan at 516-255-3812, or email him at Matthew.McSweegan@frost.com

13th Annual Customer Contact, East:
A Frost & Sullivan Executive MindXchange
April 23 - 26, 2017
Fort Lauderdale Marriott Harbor Beach Resort and Spa
Fort Lauderdale, Florida

11th Annual Customer Contact, Europe:
A Frost & Sullivan Executive MindXchange
12 - 14 June 2017*
European Locale*

*Date and location are subject to change.
Aspect helps companies deliver remarkable customer experiences across every conversation and channel - through a single, elegant software platform. As the global leader in customer engagement solutions and cloud hosting services, our unified interaction management, workforce optimization and back-office solutions seamlessly orchestrate people, processes and touch points.

www.aspect.com

24-7 Intouch is a global contact center outsourcing company that delivers customizable, customer service solutions, across all industry segments. Using the most advanced technology, comprehensive insights, and brand specialists for each account, 24-7 Intouch is able to provide a multichannel approach, via voice, live chat, e-mail and social media management.

www.24-7intouch.com

Aceyus Intelligence provides real-time reporting, historical reporting and analytics for enterprise-level contact centers. We integrate data from multiple sources, vastly improving visibility into the customer journey. Enhanced omni channel insight and our flexible, user-friendly reporting capabilities help businesses understand and manage their customer and agent experiences.

www.aceyus.com

Arise is a pioneer of on-demand customer management technology and business process outsourcing. Our cloud-based platform provides a virtual network to connect primarily work-at-home service professionals running small call center businesses to companies needing contact center and other business services. Arise provides a superior customer experience for innovative enterprises from startups to Fortune 500.

www.arise.com

arvato is one of the world’s leaders in customer relationship management. Our 43,000 employees provide omni channel customer contact support, from 27 different countries & in over 100 locations, for many famous brands. If you want to make (digital) customer contact more personal for you and your customers, get in touch.

www.arvato.com

Cicero provides process analytics and automation solutions that help organizations isolate process issues and automate employee tasks in the contact center and back office. By realizing and removing the barriers to productivity, customers such as Nationwide and UBS use Cicero solutions to build enterprise value by improving performance, reducing cost, and transforming the employee and customer experience.

www.ciceroinc.com

Concentrix, a wholly owned subsidiary of SYNNEX, is a global business services company. Focused on process optimization, customer engagement strategy, technology innovation and ecosystem performance. Our holistic approach to customer engagement, deep domain expertise and process innovation deliver unique, transformational solutions for our clients. We are different by design.

www.concentrix.com

Empirix is the recognized leader in delivering solutions to optimize customer experiences—in contact centers, mobile and fixed-line networks. Using technologies for testing, monitoring and analysis, Empirix empowers organizations to overcome challenges and promote informed decision making. We help clients around the world realize the value of their technology investments.

www.empirix.com

Five9 is a leading provider of cloud contact center software, bringing the power of the cloud to thousands of customers and facilitating more than three billion customer interactions annually. Since 2001, Five9 has led the cloud revolution in contact centers, helping organizations of every size transition from premise-based solutions to the cloud.

www.five9.com

At Genesys we have been dedicated to helping organizations of all sizes deliver exceptional customer experiences. For over 25 years, we’ve delivered customer engagement, employee engagement, and business optimization solutions that have enabled great customer relationships and business results.

www.genesys.com

HGS provides business process management (BPM) services from traditional voice contact centers to digital, back-office, and marketing solutions. With 40,000 employees in 66 worldwide locations, HGS expertise spans industries that include telecommunications and media, healthcare, insurance, banking, consumer electronics and technology, retail, consumer packaged goods, and the public sector.

www.teamhgs.com/us/

inContact’s powerful cloud-based solutions help today’s contact centers create profitable customer experiences and optimize the quality and effectiveness of every customer interaction.

www.incontact.com

Interactions is a leading provider of speech and natural language technology that enables businesses and consumers to engage in productive conversations. With flexible products and solutions designed to meet the growing demand for unified, multichannel customer care, Interactions is delivering significant cost savings and unprecedented customer experience for some of the largest brands in the world.

www.interactions.com
LogMeln: LogMeln’s customer engagement solutions give companies new ways to reach and support today’s connected customer. Their live chat, multichannel and remote support solutions, BoldChat and Rescue, provide a better overall customer experience, improve conversions, build loyalty and boost CSAT like never before.

BoldChat.com | LogMelnRescue.com

Mattersight: Mattersight is a leader in enterprise analytics focused on customer and employee interactions and behaviors. Mattersight’s Behavioral Analytics service leverages a SaaS+ delivery model, millions of proprietary algorithms and unique behavioral models to drive significant business value for its clients by improving operational performance and predicting customer and employee outcomes.

www.mattersight.com

Pegasystems: Pegasystems develops strategic applications for sales, marketing, service and operations. Pega’s applications streamline critical business operations, connect enterprises to their customers seamlessly in real-time across channels, and adapt to meet rapidly changing requirements. Pega’s Global 2000 customers include many of world’s most sophisticated and successful enterprises.

www.pegacom

Pipkins Inc.: Pipkins Inc., founded in 1983, is the leading supplier of workforce management software and services to the call center industry, providing sophisticated forecasting and scheduling technology. Pipkins forecasts and schedules more than 300,000 agents in over 700 locations across all industries worldwide. They are headquartered in St. Louis, Missouri.

www.pipkins.com

Qualfon: Qualfon is a business process outsourcing company and a provider of contact center services. Qualfon’s success dates back to 1995 and spans outsourcing locations across the U.S.A, Mexico, Guyana S.A., and the Philippines. With industry-leading retention rates, Qualfon’s employees stay longer-providing you high-quality services at a lower price.

www.qualfon.com

SmartAction: We make a phone call effortless. Our Intelligent Voice Automation (IVA®), a cloud-based artificial intelligence platform, provides 100% natural language voice self-service, which allows callers to easily complete requests without the use of a Live Agent. In turn, we help companies provide an effortless customer experience while reducing operating costs.

www.smartaction.com

Sparkcentral: In an era of empowered, hyper-connected customers, Sparkcentral is the only CRM platform for enterprises that unifies social, mobile, cloud and contextual data to proactively deliver personalized and engaging customer experiences. Customer service teams use our software to efficiently handle large amounts of customer inquiries in a fast and structured manner. Let’s reimagine the future of customer experience together.

www.sparkcentral.com

SPi Global: SPi Global is a leading technology-enabled Business Process Outsourcing solutions provider for the design, enrichment and management of customer relationship and digital content. Named the 2015 Best Company to Work for in Asia, SPi Global has 22,000+ dedicated professionals across the United States, Philippines, Nicaragua, Netherlands, India, Vietnam, China, and Australia.

www.spi-global.com

Support.com: Support.com, Inc. (NASDAQ: SPRT) is a leading provider of cloud-based software and services for technology support, including the Nexus® Support Interaction Optimization (SIO) solution that enables companies to boost agent productivity, dramatically improve the customer experience and more quickly resolve complex technology support issues.

www.support.com

Teleperformance: Teleperformance, the worldwide leader in outsourced omnichannel customer experience management, serves companies around the world with customer care, technical support, customer acquisition, digital solutions, analytics, back office and other specialized services. We are a team of 190,000 people across 311 sites in 65 countries providing support in 75 different languages.

www.teleperformance.com

Verizon: Verizon Enterprise Solutions creates global connections that generate growth, drive business innovation and move society forward. With industry-specific solutions and a full range of global wholesale offerings provided over the company’s secure mobility, cloud, strategic networking and advanced communications platforms, Verizon Enterprise Solutions helps open new opportunities around the world for innovation, investment and business transformation.

www.verizon.com

VHT: VHT believes that delivering an exceptional customer experience doesn’t have to be difficult. Every customer interaction, regardless of channel, should enrich the brand and deepen the customer relationship. VHT offers complementary, patented solutions that help organizations enhance the customer journey in order to achieve greater loyalty, efficiency and revenue opportunities.

www.virtualhold.com
The Benefits of This Digital eBook are Numerous:

✔ Benefit From All Session Summaries  These are not transcripts, but actual summaries focused on key observations and take-aways, featuring tactics and strategies for immediate implementation.

✔ Video Access to The Event Keynotes  Watch and learn from the lessons shared by event keynote speakers—these industry experts present case studies, lessons learned and provide invaluable thought leadership and inspiration for senior executives.

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✔ The Entire Event  is catalogued and searchable so you can find what you are looking for fast. Why waste valuable time looking when you could be learning?

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Pricing:
The Executive MindXchange Chronicles are now available for purchase. Additional savings apply when purchased prior to or on-site at the event.

Participant Pricing:
Pre-event: $395  |  Post-event: $495

Non-Participant Pricing:
Post-event: $695

RESERVE YOUR CHRONICLES TODAY: Matthew McSweegan @ 516.255.3812 or email: matthew.mcsweegan@frost.com

NOTE: Frost & Sullivan makes every effort to collect and ensure the quality of individual session chronicles; however, the summaries presented in the articles are the expert opinion of the writers and inclusion/exclusion of specific material is at the discretion of each speaker. While every effort is made, there is no guarantee that notes for each and every session will be submitted as requested.
12th Annual Customer Contact, West:

A FROST & SULLIVAN EXECUTIVE MINDXCHANGE

OCTOBER 23 - 26, 2016 | JW MARRIOTT TUCSON STARR PASS RESORT & SPA | TUCSON, AZ

Register online! www.frost.com/ccw

Registration at Frost & Sullivan Executive MindXchange events is subject to review, and restricted to end user practitioners. Therefore, we reserve the right to decline attendance to any company deemed to be a vendor in the market. For information on how to sponsor a Frost & Sullivan Executive MindXchange, please contact Gary Robbins at grobbins@frost.com.

VENUE INFORMATION
JW Marriott Tucson Starr Pass Resort & Spa
Tucson, AZ 85745
Tel: 520 792 3500

We suggest you arrive Saturday, October 22nd. Frost & Sullivan will be reserving a limited number of discounted rooms at the event property. Please contact the property directly for rates, availability, and to book your accommodations. Be sure to mention you will be participating in the Frost & Sullivan event.

TO REGISTER:
ONLINE
www.frost.com/ccw
EMAIL
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Participation Package includes:

1. Complete access to our Customer Contact Executive MindXchange, including all keynotes, interactive workshops and non-stop networking
2. Complimentary subscription to our quarterly Customer Contact eBulletin
3. Access to our Customer Contact Power Point portfolio with insightful thought leadership and best practices from our event speakers
4. Access to dozens of Customer Contact industry articles & white papers
5. Complete access to our onDemand library of recent industry eBroadcasts
6. Membership to Frost & Sullivan’s Customer Contact, invitation-only LinkedIn Community; available only to event participants and other selected VIP companies
7. Preferred pricing on the Executive MindXchange Chronicles; a collection of notes of the entire Executive MindXchange
8. Access to on-site, post-event Custom Team Training; available by reservation
9. New Connections, New Friendships, New relationships

For more details on these registration features, visit: www.frost.com/YourParticipation

Schedule a One-On-One Growth Strategy Dialogue

A Growth Strategy Dialogue (GSD) is a customized session for Senior Executives facilitated by a Frost & Sullivan growth strategy consultant and a tenured industry analyst. Ask questions and brainstorm with experts to evaluate and enhance your growth strategy. These one-on-one sessions are exclusive with a limited number of slots, and reservations will be confirmed on a first-come, first-served basis.

Please have a Frost & Sullivan associate contact me to secure my Growth Strategy Dialogue time slot.

Registration/Pricing Schedule

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  ($250 Savings)
  (Inclusive of Event Registration, Executive MindXchange Chronicles, Choice of Networking Activity, and Site Tour)
  $3520

- Event Registration - Executive Series
  ($150 Savings)
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A-La-Carte Options:

- Event Registration – General Pass
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- Golf Networking Scramble
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- Tucson Food Tour and Networking Challenge
  $95

- Site Tour
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- Executive MindXchange Chronicles
  $395

Customer Contact 2016, West Executive MindXchange Chronicles

A real Golden Nugget that continues to add value post-event! As a thorough and focused set of notes, the Customer Contact 2016, West Executive MindXchange Chronicles is prepared by your peers to ensure you don’t miss out on any sessions that run concurrently with those that you selected. If you are unable to sign up for this now, you may order post event.

Please note that post event purchases will be $495 so get your hands on these collections at the lower rate now!

- Non-participant
  $995

Group Discounts Available
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