



*Private Meeting Agenda*

# **CUSTOMER EXPERIENCE COUNCIL #1**

Tuesday, April 19 – Wednesday, April 20, 2016

*Confidential: please do not share outside Council*

*Private Meeting Agenda*

## **CUSTOMER EXPERIENCE COUNCIL #1**



COLLABORATIVE GAIN

***Mission Bay Conference Center, 2<sup>nd</sup> floor***

*Moderator: Christine Garofoli / Mobile: 415-987-8321*

**Councils meeting at Mission Bay Conference Center: 1, 3, 5, 6, 8, 9, 11**

**Address: 1675 Owens St, San Francisco, CA 94158**

*When you arrive at the Mission Bay Conference Center on 1675 Owens Street in San Francisco, there will be a registration desk in the Fisher atrium by the large statue of people who will give you your badge and direct you to the 2<sup>nd</sup> floor where your meeting is taking place.*

## CUSTOMER EXPERIENCE COUNCIL #1



COLLABORATIVE GAIN

### Day 1: Tuesday, April 19, 2016

Mission Bay Conference Center

2<sup>nd</sup> Floor, Coblenz room

1675 Owens Street, San Francisco, CA 9

**8:00 – 8:45**

#### **Breakfast in the Robertson Foyer**

We'll have a hot breakfast waiting for you. Come connect with other council members over breakfast before we begin our council meeting!

**8:45 – 9:00**

#### **Welcome, Agenda Review**

*Christine Garofoli*

2<sup>nd</sup> Floor, Coblenz room

**9:00 – 10:15**

#### **Introductions & Story Sharing (5 min/person)**

- The usual (name, role, organization)
- What you hope to get out of the next two days
- Tell us a story about (choose one)
  - something that stands out to you about your first job
  - or the last time you were treated really well as a customer

**10:15 – 10:30**

#### **Break in the Robertson Foyer**

## CUSTOMER EXPERIENCE COUNCIL #1



COLLABORATIVE GAIN

### Day 1: Tuesday, April 19, 2016 (continued)

Mission Bay Conference Center

2<sup>nd</sup> Floor, Coblenz room

1675 Owens St, San Francisco, CA 94158

**10:30 – 11:30**

#### **It Takes a Village: Evangelizing CX throughout Your Company**

- **RFH: Influencing to Impact Change**  
How do you show improvements in client experience in a quick way to gain support for key initiatives, whether with the C-Suite or across departments? Everyone agrees customer experience is important—but how can you influence others to take action?
- **Customer Story Cartooning**  
T will show how she brings customer stories to life in her company to inspire action in different departments.
- **Roundtable Discussion: Influencing Culture**
  - How are you successful in influencing change?
  - What is necessary to truly change the culture of an organization to be more customer-focused and act on that customer focus?

**11:30 – 12:15**

#### **Innovation in CX**

How are you leveraging the latest technology to encourage better customer interactions? S will share his experience implementing the Intelligent Virtual Assistant at his company to bridge the gap between human and automatic support. M will talk about their innovative ways to connect online customer experience with retail with texting, video chats, etc.

**12:15 – 12:30**

#### **Quick Wins Sharing**

J will share the concept of using “Audience Modeling” when you don’t have time or opportunity to create or work with traditional UX personas.



## CUSTOMER EXPERIENCE COUNCIL #1

### Day 1: Tuesday, April 19, 2016 (continued)

Mission Bay Conference Center

2<sup>nd</sup> Floor, Coblenz room

1675 Owens St #251, San Francisco, CA 94158

**12:30 – 1:30**

#### **Lunch**

Robertson Foyer. People can eat in our meeting room, or in Robertson 1 or on the outdoor patio.

**1:30 – 2:30**

#### **Customer-Focused Scorecards & Metrics that Drive Action**

T will share the customer-focused scorecard he rolled out at Kaiser Permanente. By tying metrics to the experience KP's trying to create, they're defining success that reflects something more meaningful than the usual VOC and CSAT metrics.

**2:30 – 3:00**

#### **Mobile Trends: What's Working, What's Not**

B's company decided to move towards dynamic design, but process to transition is going slowly.

- Is m.dot going away?
- Is responsive design the best experience?
- What are you doing for your mobile strategy?
- What's working? What's not working?



## **CUSTOMER EXPERIENCE COUNCIL #1**

### **Day 1: Tuesday, April 19, 2016 (continued)**

Mission Bay Conference Center  
2<sup>nd</sup> Floor, Coblenz room  
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**3:00 – 3:30**

**Break in the Robertson Foyer**

**3:30 – 4:30**

**Managing Teams: Leading Your Employees in the CX Journey  
& Creating a Lean Culture**

#### **Problem Solving Toolkit**

M will share how she implemented a problem solving toolkit to increase productivity and empower employees.

#### **Creating Lean Culture**

J will share how she led her team through customized lean training to create an empowered and productive workforce.

**4:30 – 5:00**

#### **Show & Tell: New, Usable, Can't Live Without It**

Back by popular demand: What new apps, websites or digital experiences are rocking your world that you can't live without?

**5:00**

#### **Meetings end, Head to private council dinner taking place at The Plant**

The Plant Organic Café--Pier 3, San Francisco

10-15 minute ride from Mission Bay to The Plant on the Embarcadero-Pier 3.  
Let's share a few Ubers and meet there.



## **CUSTOMER EXPERIENCE COUNCIL #1**

### **Day 2: Wednesday, April 20, 2016**

Mission Bay Conference Center  
2<sup>nd</sup> Floor, Coblenz room  
1675 Owens St #251, San Francisco, CA 94158

**8:00 – 9:00**

#### **Breakfast in the Robertson Foyer**

We'll have another hot breakfast for you. Come connect with other council members over breakfast before we begin our council meeting!

**8:45 – 9:00**

#### **Welcome & Quick Tuesday Takeaways**

**9:00 – 10:00**

#### **The Future of CX in the Organization**

##### *Roundtable Discussion*

To centralize or not to centralize—that is one question. T will share how at her company wants to create multiple CX teams and how she's thinking about the role of Customer Experience in her organization.

- Where is CX in your organization?
- How does your company view CX within the org chart?
- What are you seeing as trends in this role?
- How to best manage the centralize vs. decentralize question?

**10:00 – 10:15**

#### **Flex Time**

**10:15 – 10:30**

#### **Break**



## CUSTOMER EXPERIENCE COUNCIL #1

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### Day 2: Wednesday, April 20, 2016 (continued)

Mission Bay Conference Center  
2<sup>nd</sup> Floor, Coblentz room  
1675 Owens St #251, San Francisco, CA 94158

**10:30 – 11:00**      **Quick Wins: CX Strategy Framework**  
B will share how he uses a CX Strategy Framework to increase business and client value.

**11:00 – 11:45**      **Rapid Fire-- Omni Channel CX, Bosses & Transitions**  
Anything new your company is doing to optimize the omni-channel experience? What do you do when you don't agree with your boss strategically? Ch-ch-ch-changes. Advice for those in transition?

**11:45 – 12:00**      **Flex Time**

**12:00 – 12:15**      Meeting Close and Agenda for next time  
**Dates for Next Meetings – Date & Location**  
*Wed October 5- Thu October 6, 2016, NYC*  
Let's lock them in our calendars and RSVP right now!

**12:15 – 12:25**      Scheduling check in conversations

**12:25 – 12:45**      Private council highlights and parking lot

**12:45 – 12:55**      **Fill out Net Promoter Survey**  
*BJ will email you the survey - but link is here also*  
<http://www.surveymoz.com/s/Spring2016/>

I'll have backup paper survey if the survey link doesn't work for any reason.

We want every member to fill out the net promoter feedback. As you know, the Collaborative Gain team takes the feedback seriously and acts on it.





## CUSTOMER EXPERIENCE COUNCIL #1

### Day 2: Wednesday, April 20, 2016 (continued)

Mission Bay Conference Center  
2<sup>nd</sup> Floor, Coblentz room

**1:00– 2:30**

Lunch in the Fisher room on the first floor with all other councils and Product Habits Workshop attendees, coat check on the second floor at the end of the hallway in the Robertson Foyer

**2:30 – 2:45**

Buffer time to get people back up to Robertson on the 2nd floor from Fisher

**2:45 – 2:50**

**Welcome - Phil Terry**

**365 Update** – Britany Crown

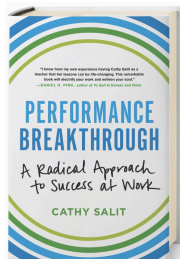
Britany will give a quick update on our increased activities throughout the year – like our small dinner program and our workshop program. She will also ask members to answer a quick poll to help us continue to improve your 365-day experience.

**2:50 – 3:15**

**Slow Agile** – Phil Terry

Phil will give a brief talk about what he calls Slow Agile and how we all - whether focused on product development, marketing, or the design of cultures and businesses as a whole - need to periodically slow down to speed up. After introducing the concept, he will briefly explore the concept of slow – which is not just about speed but also about where attention is directed. Great poets, artists, innovators, and leaders all share a surprising commitment that Phil will explain.

**3:15 – 4:30**



**Performance Breakthrough: Culture, Creativity, and the Competitive Edge** – **Cathy Salit, Founder and CEO, Performance of a Lifetime**

With the theme for the spring meetings focused on culture and the employee experience – and with the launch of our first HR and Employee Experience Council – Phil asked Cathy Salit to lead an interactive session based on her New York Times Bestselling book published early April 2016.

Cathy's work combines improvisational theatre, developmental psychology, and organizational behavior to help build or rebuild culture and employee experience for a wide range of organizations. She and her growing team have worked with oncology nurses at Johns Hopkins, Olympic athletes with the U.S. Olympic Committee, and product developers, general managers, and senior leaders at companies ranging from American Express to Twitter.

**4:30 – 6:00**

Cocktails and book signing in the Robertson Foyer for all members and for all Product Habits Workshop attendees and speakers. We have invited Council alums and friends to also join us for cocktails.

**Directions on next page**



COLLABORATIVE GAIN

**Venue directions:** Depending on where you're coming from, **it may be easiest to take a cab.** It's also possible to get there directly via BART and UCSF shuttle or Muni. You can also drive and then park in the nearby parking garage. The venue is not well-marked. When you get onto Owens, look for the sign listing the "William J. Rutter Center". Our venue is the red building to the right of the sign, labeled the "William J. Rutter Center" and even though it's not mentioned anywhere, this is in fact the Mission Bay Conference Center.

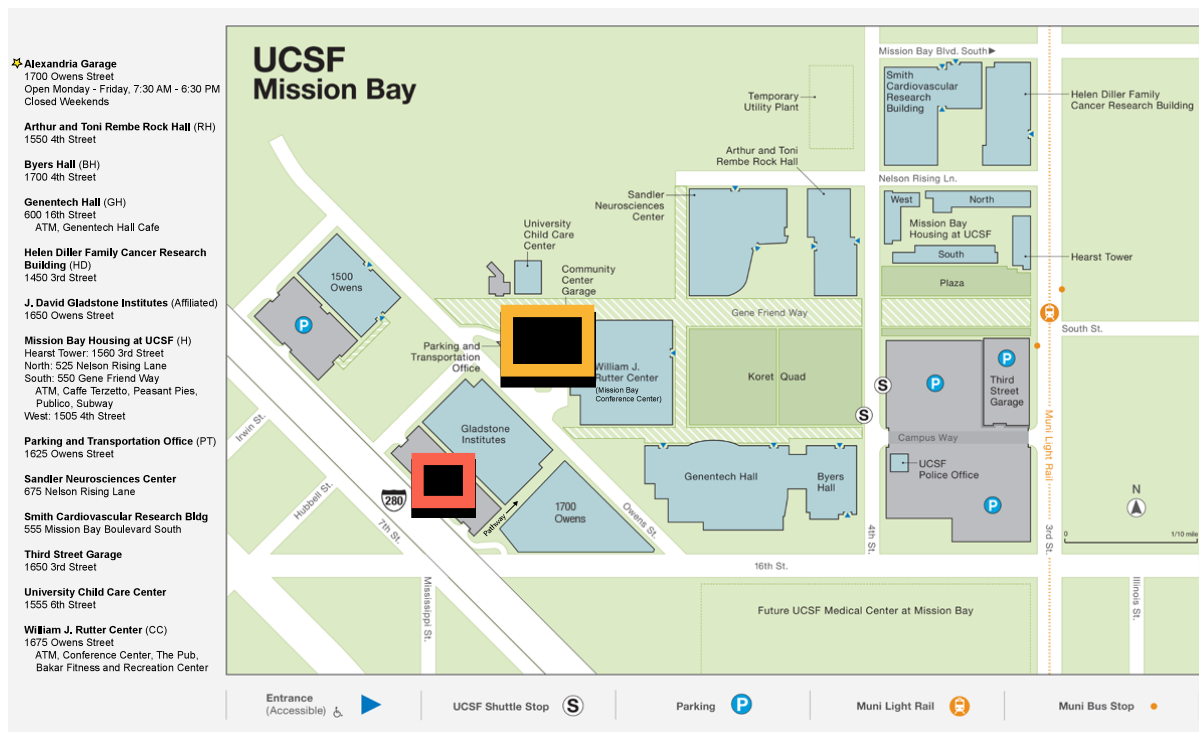


Getting there **via cab:** Tell the cab driver the street address - 1675 Owens - and if you need to be more explicit, ask for "UCSF Mission Bay," or "Mission Bay Conference Center at UCSF."

If you're **driving**, and arriving *\*before 6:30 pm\** park in the Alexandria Garage (in the red rectangle) since it is the cheapest day rate. The Alexandria Garage closes at 6:30 pm but people who entered the garage earlier than 6:30 pm can leave since their ticket allows them to exit.



COLLABORATIVE GAIN



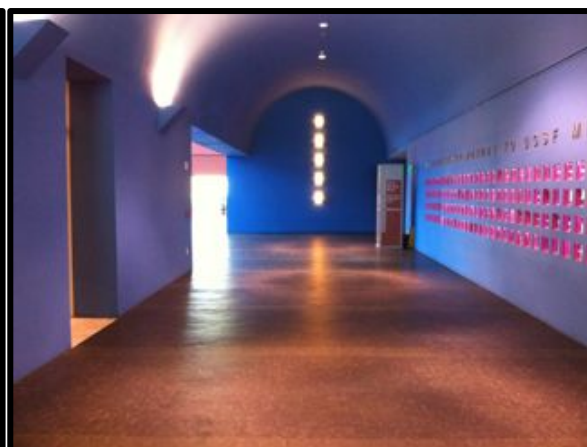
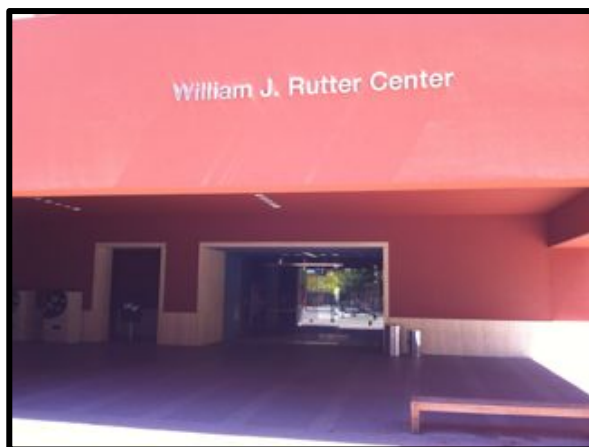
Getting there **on BART**: Take the BART to the "16th Street Mission" station. From this point, pick up the Red Line UCSF shuttle in front of the Burger King on the northeast corner of the intersection. The shuttle runs every 15 minutes. The second stop is the conference center (William J. Rutter Center/Mission Bay Conference Center). The shuttle starts at 6:02am and the last run is at 7:52pm.

Getting there **on Muni**: The T-Third Metro Line picks up at the 4th and King Street Caltrain Station, as well as the Embarcadero BART station. Get off at the UCSF Mission Bay Station on 3rd Street, across from the campus.

Once you enter, go down the long blue hallway.



COLLABORATIVE GAIN



Then when you arrive in the atrium, just beyond the giant statues is a grayish wall, where our registration table will be (see arrow).

