



connected

Customer Experience Summit



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Message from Dan Gordon

Welcome to Omaha! I speak for everyone at West when I say that we're thrilled to have you with us for the inaugural Connected Customer Experience Summit.

Many great brands are represented here this week. Please take the time to meet one another, share insights, ask questions, float ideas and have some fun along the way.

Our hope is that you will leave Omaha equipped with new tactics to be successful in your day-to-day operations and with a crisper understanding of West as your communication partner.

Should you have any questions while you're in town or when you get back to the office, please don't hesitate to reach out to me.



Dan Gordon
SVP, Strategy &
Development |
dggordon@west.com



Message from Courtney Snyder

The client engagement team at West is passionate about our clients, and we are so glad you could join us for this first-ever Connected Customer Experience Summit.

Whether you've been working with West for a long time or a matter of weeks, I hope that you find your visit worthwhile. From our in-house pros to industry gurus, we have many great speakers on the agenda and a number of workshops designed to help you to think about your customer experience in new ways.

It's wonderful for both your business and ours to get together and share ideas. Thanks for being a part of this collaboration. I hope it's just the beginning.

Welcome to Omaha!



Courtney Snyder
SVP, Client Engagement |
cksnyder@west.com





Ah-Ha Moments

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

Monday, October 5

PRE-CONFERENCE SESSIONS

Prior registration required.

The shuttle bus will meet you in front of the Hilton Garden Inn and will leave promptly at 3:00 p.m.

WEST CREATIVE SERVICES TOUR

3:00 p.m. - 4:30 p.m.

Check, check. Have you ever wondered how we create effective, helpful, brand-aligned personalities with automated interactive voice response technology? Come take a tour of West's Creative Services department to get a behind-the-scenes look at our in-house voice recording studio and meet our team of IVR experts.

Location: West Headquarters

Presenter: Terry Olson, Creative Services Manager | tkolson@west.com

TD AMERITRADE PARK TOUR

3:00 p.m. - 4:30 p.m.

Play ball! Do you know that Omaha has been the destination for the NCAA Men's College World Series since 1950? Join us on a VIP tour of the stadium where the "Greatest Show on Dirt" kicks off every June. We'll have VIP access to the state-of-the-art locker rooms, dug-outs, warm-up areas, suites and more.

Location: TD Ameritrade Park





MEET & GREET RECEPTION

6:30 p.m. - 9:30 p.m.

Let's get this summit started! Enjoy casual food, drinks and socializing with West and fellow attendees — just steps from your hotel.

Location:

Nosh

1006 Dodge St.

Omaha, NE 68102

noshwine.com

Tuesday, October 6



BREAKFAST & REGISTRATION

7:00 a.m. - 8:30 a.m.

Collect your welcome materials, a cup of coffee and a hearty breakfast. We know that work doesn't stop because you're in Omaha, so please feel free to come down early to catch up on email.

Location: Hilton Garden Inn,
Seavey Room, 2nd Floor

CONFERENCE KICK-OFF

8:30 a.m. - 8:45 a.m.

The Summit kicks off at One Thousand Dodge! From market research and industry trends, to an inside look at what's coming down the pike at West, we have a lot in store for you. We'll make a few quick introductions and get started.

Location: 1000 Dodge
Presenter: Dan Gordon, SVP, Strategy
& Development | dggordon@west.com

FROM BEST SERVICE TO ME2B

8:45 a.m. - 9:30 a.m.

To start the summit off right, Bill Price, founder of Driva Solutions, will share the "7 Customer Needs" and "4 Foundations" that appear in his newly released book: *Your Customer Rules! Delivering the Me2B Experiences That Today's Customers Demand*. Bill's end-to-end customer experience findings build on those from his first book: *The Best Service is No Service*. Hearing about his latest research behind the "Me2B era," we'll all be empowered to think about things we can address in our own businesses—like ease, trust and an energized workforce—in order to deliver great customer experiences.

Location: 1000 Dodge
Presenter: Bill Price, President, Driva Solutions |
bill@drivasolutions.com

EXAMINING CONSUMER INSIGHTS IN A MULTI-CHANNEL ENVIRONMENT

9:30 a.m. - 10:15 a.m.

Take a close look at industry norms and best practices to carve out your strategy. In this session, Execs in the Know Founder Chad McDaniel examines findings from the sixth installment of the CXMB series, *The Consumer's Perspective: Exploring Multi-Channel Customer Care*, which provides customer experience professionals with a baseline to measure their organization's activities. This year's report reveals compelling data trends and insights into key consumer expectations, opinions and experiences.

Location: 1000 Dodge

Presenter: Chad McDaniel, President, Execs in the Know | chad@execsintheknow.com

BEYOND PRODUCTS AND SERVICES: SOLUTIONS TO CONNECT YOUR CUSTOMER EXPERIENCE

10:15 a.m. - 10:45 a.m.

What's on the horizon from West? In this session, Senior Vice President of Product Development Andy Bird will talk about the strategic innovation, data and dedication that help you transform automated communication technologies into a highly integrated, beautifully orchestrated customer experience. West is strengthening core solutions and will continue optimizing them to support clients' unique business objectives. In other words, you'll get the inside scoop on how we plan to make sure your interactions just keep getting better.

Location: 1000 Dodge

Presenter: Andy Bird, SVP, Product Development | abird@west.com

BREAK/NETWORKING

10:45 a.m. - 11:00 a.m.

CASE STUDY - SUDDENLINK

11:00 a.m. - 11:45 a.m.

Have you ever wondered how other companies are using West's solutions? During this session, you will have the opportunity to hear from another conference attendee on what their company is doing to create connected customer experiences.

Location: 1000 Dodge

Presenters: Courtney Snyder, SVP Client Engagement | cksnyder@west.com

Susan Shockey, Sr. Manager – Business Operations, Suddenlink | susan.shockey@suddenlink.com



LUNCH - WHAT'S TRENDING?

11:45 a.m. - 1:00 p.m.

Kick back and interact. Over lunch, you'll connect with West experts and fellow attendees about challenges and tips to handle issues that are relevant in our businesses today.

Location: 1000 Dodge

DRIVING THE INNOVATION CRUSADE WORKSHOP

1:00 p.m. - 3:00 p.m.

Trends don't emerge overnight. In this two-hour workshop, Michael Tchong, entrepreneur, trends and innovation speaker, elaborates on the relatively new phenomenon of global trend-monitoring to explain how trends develop over dozens or even hundreds of years. You'll learn how to become a trend-spotter, which is an increasingly mandatory expertise in a consumer-driven world. This session will stimulate your penchant for innovation with fresh ideation techniques, business approaches and industry perspectives.

Location: 1000 Dodge

Presenter: Michael Tchong, Founder, Social Revolution | mt@ubercool.com

BREAK/NETWORKING

3:00 p.m. - 3:15 p.m.

Location: 1000 Dodge

USING DATA TO OPTIMIZE YOUR CUSTOMER EXPERIENCE

3:15 p.m. - 4:00 p.m.

It's great to stream content that customers crave and send updates that keep them in the know, but those things alone don't create a connected customer experience. How do you make customers feel like every interaction is all about them? Data and analytics expert, Jeremy Wortz, will share three steps you can start taking to optimize your customer experience using the data you already have.

Location: 1000 Dodge

Presenter: Jeremy Wortz, VP, Strategic Analytic Insight | jswortz@west.com

BREAK

4:00 p.m. - 6:00 p.m.

EVENING EVENTS

The shuttle bus will meet you in front of the Hilton Garden Inn and will leave promptly at 6:00 p.m.

DINNER AT THE GREY PLUME

6:00 p.m. - 8:30 p.m.

You're in for a treat at Omaha's homegrown hotspot: The Grey Plume. This elegant establishment has helped put Nebraska on the national culinary map with its warm hospitality and seasonally driven, sustainable cuisine. From house-cured charcuterie to freshly made preserves, every mouthwatering dish inspires deep appreciation for farm-to-table innovation.

thegreyplume.com

AFTER HOURS EVENT AT GRANE WHISKEY BAR

8:30 p.m. - 12:00 a.m.

After dinner, we'll head over to Grane, a modern speakeasy in the heart of town. Sip on small-batch whiskey, craft cocktails or even the prohibition-style House Old Fashioned on tap to put the nightcap on a fruitful first day of the summit.

granewhiskey.com

We will have regular shuttle buses running between the evening events and the Hilton Garden Inn.



Wednesday, October 7

BREAKFAST

7:00 a.m. - 8:30 a.m.

Location: Hilton Garden Inn,
Seavey Room, 2nd Floor

WELCOME

8:30 a.m. - 8:45 a.m.

To kick off day two, we'll quickly recap Tuesday's take-aways, make a few more introductions and get started.

Location: 1000 Dodge
Presenter: Dan Gordon, SVP, Strategy
& Development | dggordon@west.com

PRODUCT CIRCUIT

8:45 a.m. - 10:30 a.m.

What better way to improve West's communication solutions than to get input from companies that put them to the test? In this session, we'll break into small groups to share demos of our latest and greatest solutions. You will have a unique opportunity to give constructive feedback, brainstorm ideas and report back to other conference attendees.

Location: 1000 Dodge

Presenters:

Andy Bird, SVP, Product Development |
abird@west.com

Brandee Garner, Director of Product Management
& Development | bgarner@west.com

Jil Fisher, VP, Product Management |
jmfisher@west.com

Julie Wajda, Product Manager | jwajda@west.com

Doug Thompson, Director of Product Management
& Development | dbthompson@west.com

Marcus Schmidt, Product Manager |
mschmidt@westipc.com

Colin Roberts, Senior Director Product Integration |
croberts@west.com

David Facer, VP, Systems Development |
dtfacer@west.com

Craig Webster, SVP, Systems Development |
cawebster@west.com

David Orwick, Product Development Manager |
daorwick@west.com



SMS Natural Language

Customers – particularly the younger set – are far more inclined to pick up their phones for SMS than to make a call. When they send a text or reply to a proactive notification from your brand, this solution automatically enables an appropriate response by understanding their natural lingo, including short-hand SMS-speak and multiple dialects.

SMS Assistant

SMS/texting has grown to be many customers' preferred method of communication. It's only logical to expect a reply when one sends a text, but automated responses won't always suffice for more complex interactions. This user-friendly, context-aware solution puts power at agents' fingertips to offer real-time support at a fraction of the cost of traditional customer care channels.

Multi-Modal IVR

Smartphones might as well be an extra appendage for most customers, and the preference to self-serve whenever possible is higher than ever. This solution enables guidance and care through multiple channels at once to, say, talk a user through scheduling a payment on a mobile device by sending an SMS, directing to a unique URL and providing confirmation, all without ever leaving the IVR.

Notifications Hub

As brands have gradually introduced proactive notifications to customers, applications across business functions, platforms and vendors aren't always seamless. This smart, technology-agnostic solution will offer 360-degree visibility by aggregating notifications sent via West's platform or any third parties'. With this visibility, clients can avoid duplicate outreaches and begin the journey to optimize proactive notifications.

Unified Communications

Interactive Services is just one arm of West Corporation's mission to help brands connect and deliver. Unified Communications brings together best-in-class organizational tools for instant messaging and presence management, Web collaboration, audio conferencing and other applications. As with your Interactive Services solutions, a highly skilled services team helps enterprises strategically deploy communications for maximum impact.

Health Engagement Center

Healthcare is a rapidly evolving industry, increasingly reaching beyond the clinical setting to improve the quality of care across the continuum, while reducing costs of patient access, transition care, routine care and chronic care management. This innovative suite blends clinical support with leading technology-enabled administration, monitoring and reporting solutions to activate and engage patients, members, caregivers and providers.



BREAK

10:30 a.m. - 10:45 a.m.

Location: 1000 Dodge

ENHANCING THE WAY WE DO BUSINESS

10:45 a.m. - 11:30 a.m.

Like your organization and your customers, West is never satisfied with the status quo. We strive to provide our partners with best-in-class solutions and second-to-none service, and have recently undergone a grueling, yet rewarding exercise to map our current processes and identify areas for improvement. In this session, we'll share our jaw-dropping findings, explain our growth initiatives, and illustrate how ongoing changes will positively impact our working relationships with your organization.

Location: 1000 Dodge

Presenter: Lokesh Garg, VP Business Performance | lgarg@west.com



CLOSING

7 STRATEGIES TO IMPROVE BUSINESS DECISIONS & YOUR CUSTOMER EXPERIENCE

11:30 a.m. - 12:15 p.m.

Overcoming operational silos is one of the greatest challenges companies face. In this session, customer relationship leader, JC Quintana, will zone in on the operational, strategic and technical decisions we tend to make in isolation – that can ultimately lead to a disconnected customer experience. We'll learn how seven strategies help unify our teams across regions, cultures and customer efforts to effectively achieve business objectives, build strong customer relationships, measure the right things, and consistently deliver a top-notch customer experience.

Location: 1000 Dodge

Presenter: JC Quintana, Founder, Corporate Relationship Group | jc@corporaterelationship.com

CLOSING REMARKS

12:15 p.m. - 12:30 p.m.

That's all, folks! After a day and a half packed with information and insights, we'll bring the formal summit to a close. But your visit to Omaha doesn't have to end here.

Hopefully you have scheduled a one-on-one meeting or two with your partners at West. If you have some free time, let us know and we can give you our curated list of local attractions.

Location: 1000 Dodge

Presenter: Dan Gordon, SVP, Strategy & Development | dggordon@west.com



Speaker Bios



Bill Price

*Global Thought Leader, Author
and President of Driva Solutions*

Bill Price founded Driva Solutions, a company dedicated to creating and sustaining highly effective customer contact strategies and operations. In partnership with Antuit, a Big Data predictive analytics provider, Price and Driva Solutions help companies increase customer loyalty, reduce employee attrition and lower costs.

Price co-authored, *The Best Service is No Service: How to Liberate Your Customers from Customer Service, Keep Them Happy and Control Costs* (2008) and *Your Customer Rules! Delivering the Me2B Experiences That Today's Customers Demand* (2014).

Price co-founded the nine-country LimeBridge Global Alliance; chairs the 40-company Global Operations Council; and teaches marketing, operations management and global business to students of the University of Washington and Stanford MBA programs. He served as Amazon.com's first worldwide vice president of customer service, and held senior positions at MCI, ACP and McKinsey & Company.



JC Quintana

*Customer Strategy Expert,
Comedian and Founder of
Corporate Relationship Group*

JC Quintana is a thought leader, technology buff, stand-up comedian and customer engagement innovator. Over the past 20 years, he has guided customer and employee relationship management initiatives for companies around the world, and has been recognized as a thought leader in the field.

Quintana authored, *Speaking Frankly About Customer Relationship Management: Why Customer Relationship Management is Still Alive and Vital to Your Company's Customer Strategy* (2014), a book focused on collaboration to succeed in building engagement, centricity, service and transparency for a connected customer experience.

Quintana founded Corporate Relationship Group, a think-tank designed to help companies collaborate on strategies that win and keep the right employees, customers and partners.



Michael Tchong

*Silicon Valley Insider,
Entrepreneur and Founder of
Social Revolution*

Michael Tchong's trademark motto is: "I help you catch the next wave before it catches you." He has devoted his career to help propel trends that reinvent markets.

Tchong's third start-up, ICONOCAST, took off amidst the Internet boom of the '90s and jumpstarted his speaking circuit. He has since engaged more than 300 audiences worldwide with remarkable insights into business, lifestyle, social media, marketing and technology trends. His talks showcase brands, products and individuals who are leading the charge to innovate industry sectors. He also authored *Social Engagement Marketing*, an expert guide to the world of social media.

Tchong founded Social Revolution, a start-up that aims to reshape our future by applying next-generation technologies and consumer insights to help spur innovation.



Chad McDaniel

*Chief Relationship Officer and
Founder of Execs in the Know*

Chad McDaniel is a well-known industry expert on building professional communities. For more than a decade, Execs in the Know has earned a reputation of excellence among over 50,000 customer experience professionals and executives worldwide.

McDaniel saw a wealth of untapped opportunity in the customer management industry 15 years ago and enthusiastically set out to create a forum for knowledge-sharing and relationship-building.

Execs in the Know connects professionals with valuable content, thought leadership, industry insight, peer-to-peer collaboration and networking opportunities. McDaniel holds national events, publishes content and hosts a series of Executive Think Tank webinars to support this community.

Capitol Ave.

N. 11th St.

N. 10th St.



Nosh

1000
Dodge

Dodge St.

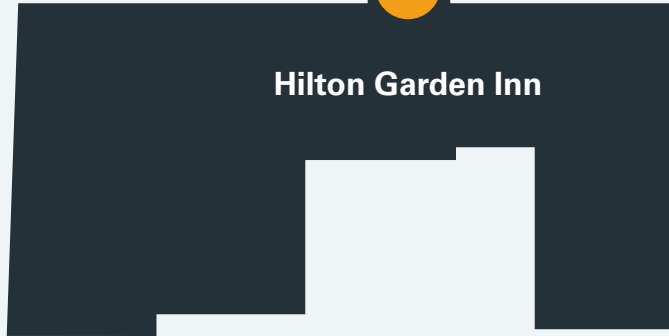
Shuttle Bus Pick Up



Hilton Garden Inn

S. 11th St.

S. 10th St.





General Information

UP-TO-DATE CONFERENCE INFORMATION

Text 'Summit' to 312.985.0347 to get conference updates. Standard text message rates may apply and you will only get messages during the conference.

CONFERENCE EMERGENCY CONTACT

In case of an emergency or should you need assistance, please text or call Amy Hennings 402.214.3734.

HELPFUL PHONE NUMBERS

Hilton Garden Inn: 402.341.4400
Omaha Taxi: 402.333.TAXI

WI-FI

To use the free wi-fi at the 1000 Dodge venue, please use the 'West Guest' connection.

SHUTTLE

For Tuesday night's events, the shuttle will pick everyone up in front of the Hilton Garden Inn. We will leave promptly at 6:00 p.m. Return shuttles to the hotel will start at 9:00 p.m.

NEED HELP?

We are here to help! Should you have any questions during the conference or at any of the events, look for a West representative wearing a black nametag.



Omaha, Nebraska

October 5-7, 2015