

## At-a-Glance: Program Overview

This year the programming at CXps has been divided into six focus areas to make it easier for you to identify the session(s) that are right for you. You are free to mix and match to create the right program. Click [HERE](#) to download a PDF you can review with your team.

- **Enterprise Capability & Leadership:** Sessions are geared toward firm leaders looking for ways to integrate client experience strategies into every aspect of their business.
- **Foundations:** Sessions take attendees through the critical elements of launching (or advancing) a successful client experience (CX) initiative. Speakers will share specific tactics and implementation techniques.
- **Tools of the Trade:** Sessions address a combination of tools that can be used to improve your clients' experience and make it easier for you and your team to integrate CX into your existing delivery systems.
- **Innovation & Trends:** Sessions are geared toward those looking for new ideas, trends, and concepts shaping the client experience. Think new, exciting, and different.
- **ROI of Client Experience:** Sessions focus on the metrics and methods you can use to demonstrate the ROI of integrating CX into your firm's strategic planning and service delivery.
- **Employee Experience (EX) and CX:** Sessions focus on how CX and EX are integrated, how to win the war for talent and reduce burnout, and how to create excitement in your team around integrating your firm's CX processes.

### The Role of Branding in the Client Experience Equation (Tim Asimos, CPSM – circle S studio)



Client Experience (CX) is often touted as “the new brand” when in reality the two concepts are complementary pieces of the overall equation. At its most fundamental level, your firm's brand defines to the marketplace what you stand for and sets client expectations for the interactions they will have with you. How well you live up to those expectations is the measure of the experience you deliver. The firms that are most successful at CX understand it is one component of an overall branding framework that starts with defining and building a powerful, differentiating brand. In this session, Tim will take a closer look at brand strategy as the foundation for delivering an exceptional client experience, explore how to define and articulate your brand, and you will walk away with steps you can take to build a powerful brand to support your CX goals. **(Tools of the Trade)**

### How to Engage Top Talent and Reduce Burnout in You and Your Firm (Pete Atherton – ActionsProve)



The best client servers are fully engaged, growing, and excelling in their organizations. This creates both consistency and confidence. Professional services leaders are on the forefront of needing to deal with the growing epidemic of burnout and disengagement in the workplace. As leaders, we need to understand all the factors that lead to burnout and how they manifest in our organizations. We then need to design approaches to address them. This session will introduce attendees to the Burnout-Disengagement Cycle and illustrate how to reverse and avoid it as employees, leaders, and organizations. You will also learn how to design employee engagement, growth, and development strategies that best meet your organization's needs while positioning your firm to become more attractive in the marketplace. **(Employee Experience (EX) and CX, Enterprise Capability & Leadership)**

## **Building a CX Playbook for Your Firm** (Heather Denny – Wells Global)



Would a McDonald's employee turn to the shift leader and say, "How do you think we ought to cook the fries today?" Probably not. Why change something that has worked before. In the world of client experience (CX), your team's understanding of what their response should be in different situations is probably not as clear cut as the McDonald's employee. The good news - it can be. In this session, Heather will share the common elements of a CX Playbook, the rules for an effective playbook, and a framework that she has used to successfully give her team the guidance they needed to KNOW how

to respond in what could otherwise have been challenging client situations. During this session, you will have the chance to participate in the creation of a CX Playbook and leave with a guideline for working with your internal team to create one for your firm. **(Enterprise Capability & Leadership, Tools of the Trade)**

## **Stop Eating Your Leaders** (John Doehring – J. Doehring & Co.)



Is your view of client experience just too small? Most professional services firms focus their efforts on creating quality projects, delivering on time and budget, and doing what they promised for their clients. These are important, but in hyper-competitive markets, they won't deliver a truly distinctive client experience. By comparison, standout organizations often employ a much different model - focusing much of their energy, passion, and treasures internally, engaging talented individuals, nurturing creative, energized teams, and developing real, servant leaders. In this session, you learn

the seven-step approach for igniting your next generation leaders - and winning the experience game. **(Enterprise Capability & Leadership, Employee Experience and CX)**

## **Jumpstarting your CX Engine** (Brandi Hobbs – Poyner Spruill)



Whether you are just igniting your CX engines or have been on your journey for some time and need a "jump," this session is for you. Brandi came to CXps for the first time in 2017 and has since then successfully jumpstarted a CX program at her firm. A true believer in collaborating and sharing, Brandi's focus in this session will be on getting started (or maybe getting started again), making meaningful progress, celebrating victories, and recognizing when to change course. Attendees will assess their current positions and leave with crowd-sourced ideas for getting over humps, making the

most of the next step, and enjoying recent successes while gearing up for future efforts. **(Foundations)**

## **Lead Well: Creating the Energy to Lead** (Becky Jacobs – Simple Change)



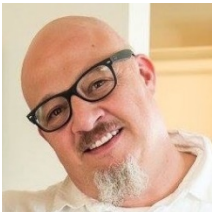
As a leader, implementing simple changes in your behaviors and routines can create a ripple effect across your organization for improved motivation. In this session you will use the "Slices of Life" tool to identify your primary area of focus and learn strategies for simple changes you can make that will lead to transformation impacts on your team and organizational culture. Strategies include building habits that improve your focus, prioritization, and impact as well as ways to help your teams improve their productivity and efficiency. **(Enterprise Leadership & Capability, Innovation & Trends)**

## The Cycle of Client Feedback: 10 Years of Experience (Lee Jordan – Gate Energy)



In the 10 years that GATE has been using the Client Feedback Tool (CFT), we have gone through four distinct stages. Each stage brought its challenges and each stage has taught us important lessons for success. We began with a roll-out to a single office of 20 people (our newborn phase) and are now using CFT in multiple sites and multiple companies with very different services and clients. During our newborn phase, there was a lot of noise and effort but not much initial progress. However, it was the investments made at this stage that set the tone for everything that was to follow. In this session we'll share the things we've tried that worked, things that didn't, and things we're still not sure how they will turn out. Ultimately, we'll share how we've kept the use of CFT relevant, fresh, and continuously evolving. **(Enterprise Capability & Leadership, ROI of CX)**

## Three Important Words in CX: Culture, Culture, Culture (Steven Keith – CX Pilots)



Organizations considering any investment in client experience need to consider the internal, cultural elements. When your team is on the front lines, it's up to them to shape the experience your client has with the firm. The question is, does your organization plan for this? Are you considering how employees factor decisions that determine experience outcomes for your clients? In this session, you will have the chance to look at CX through the lens of both the employee and the client. You will learn how to balance the employee's "what's in it for me" with the complex needs of the client. We'll discuss cultural challenges and you will leave with actionable insights firms of all sizes have used to conquer them. **(Employee Experience (EX) and CX, Innovation & Trends)**

## Accelerating Sales through the Delivery of Exceptional Client Experience (Deb Knupp – GrowthPlay)



The term "sales" can leave many of us bristling with discomfort when contemplated as pushy, manipulative, arm-twisting tactics in the name of self-interested revenue generation. But what if "sales" were less about self-interest and recast as an "act of service" designed to deliver meaningful client experience (CX) and mutual growth? This program will re-imagine what client-centric selling looks like (and feels like) and showcase specific CX behaviors, tools, and tactics that accelerate sales growth. You will leave this workshop with a clear roadmap, concrete tools and specific tasks that will bridge the ROI between sales and CX that will inspire professional service firm leaders to "double-down" on future investments in CX. **(ROI of CX, Tools of the Trade)**

## Empowering your Doer-Sellers for Greater Success (Kate Lucey – Client Savvy)



You want (and need) all members of your team to generate sales opportunities for your firm. The reality is, however, that not everyone on your team is comfortable engaging with clients (outside of discussing project deliverables). When it comes to building deeper relationships, they can feel well outside their comfort zone. They talk about not having the time, but often what they mean is that they are not sure how – it's not their skill set. Good news. In this fun and interactive workshop, Kate will show attendees how to use linguistic analysis to develop tactics that let them confidently interact with clients and prospects in a variety of typical business settings. **(Innovation & Trends, Client Savvy)**

## Values and Culture: Are they Wowing your Clients? (Ruth Lund – Legacy Center)



Much is written today surrounding the impact of culture on organizational performance. The next question? *How is our culture impacting our clients?* This workshop invites leaders to be part of a revealing discussion that helps them recognize the personal values that drive their leadership and the impact those values are having on their organizations and clients. Ruth will introduce an effective tool for measuring the values - both positive and negative - within an organization and a discussion on the power this data has to drive critical conversations. You will leave this session with an

actionable pathway to impact your firm's culture in a way that ultimately creates the client experience. **(Enterprise Capability & Leadership)**

## Strong Organizational Design = CX + EX (Andrea Maciejewski, Levenfeld Pearlstein / Deb Knupp, GrowthPlay)



For years, experts in professional services have warned about a tight and increasingly competitive market. Too many mid-sized firms are discounting their standard rates in a lose-lose race to the bottom. Levenfeld Pearlson has taken a different approach. We have stayed the course relying on an organizational structure and client experience strategy that has withstood changes in leadership while experiencing some its largest growth even during downturns in the economy. In this session, Andrea Maciejewski, Chief Marketing and Client Engagement Officer and

GrowthPlay's Deb Knupp will present a case study for how the firm is defying industry benchmarks, trends and surpassing the analytics from High Performing Organizations through their strong organizational design and alignment. **(Employee Experience (EX) and CX)**

## Creating Peak Moments in your Client Experience Journey (Jen Newman – Ignite Coaching & Consulting)



All moments are not created equal. Our experiences are mostly forgettable and occasionally remarkable. According to psychologists, we ignore or forget most of what happened in any experience and focus instead on a few particular moments: the peaks, the pits, and the transitions. Research suggests that our most positive moments share certain traits in common: elevation, insight, pride and connection. This hands-on workshop will walk you through how you can create moments that deliver those traits and build peaks with your clients instead of fixing potholes. **(Tools**

**of the Trade, Innovation & Trends)**

## Propel Your CX Initiatives with Low Hanging Fruit (Amanda Roehl, Pixels + Ink Studio / Chandra Storrusten, Visible Value)



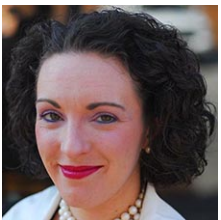
We all know that acquiring a new client costs 5X more than retaining a current client. And, you're at CXps because you get it. You understand that client experience (CX) is and will continue to be the best way to differentiate your firm to delight your clients. Yet proposals, day-to-day activities, and emergencies take priority in most firms...when, in reality, the client should. So, how do you address CX with no time left in your day AND turn CX into a differentiator for your firm? You must start somewhere. In this 1-hour **pre-conference** session (visit <https://clientexperience.org/pre-conference-workshop/> to learn more), Amanda Roehl and Chandra Storrusten will dive into six ways you can impact client experience at your firm – now. **(Foundations)**

## SME's CX Story: Pilot Project to Full Engagement (Dan Roeser – SME)



Is your client experience strategy integrated into your existing service delivery process? It can be. In 2017, SME started a pilot program using the Client Feedback Tool (CFT). Today, our firm is on track to send out more than 1,000 feedback requests during our first full year with champions in every service group. In this session, you will hear SME's CFT/CX story, see the tools they have used to simplify and operationalize the use of CFT at SME and brainstorm with others to go back with ideas to invigorate and/or launch their firm's CFT efforts. Whether you are just getting your feedback program off the ground or you want to get greater buy-in and/or engagement from your team, this session will show how to get project managers who say they are 'too busy' to fully engage in sending, responding, and embracing a culture of feedback. **(Enterprise Capability & Leadership, Foundations, Tools of the Trade)**

## Engaging the Experience Economy to Achieve Your Strategic Goals (Chandra Storrusten – Visible Value)



Standing apart from your competition AND accomplishing your strategic goals requires firm leaders to make strategic choices and bold moves. However, many firms fear the unknown and never achieve the results they really desire. The firms that embrace "both and" decision making instead of "either or" are creating new trends in CX and EX and as a result are achieving sustainable competitive advantages. During the first part of this interactive session, mini case studies will be presented showcasing a strategic goal firm leadership was trying to accomplish, the choices they contemplated, and the bold CX and/or EX moves made PLUS the outcomes of their efforts. Then it will be your turn. You will be provided with a framework for consideration of bold moves and given time to work through the framework based on one of your firm's strategic goals followed by sharing and evaluating in small groups. **(Enterprise Capability & Leadership, ROI of CX)**



## A Client UX Business Model Even a Lawyer Can Do (Eliot Wagonheim – Wagonheim Law)



Most business models are built around revenue. Firms start with the question of what creates profit and then build their departments and teams to execute that strategy. But what if you started with the question of what creates value for your clients and build everything around that? In 2010, I stopped focusing on billable hours and started basing my practice on creating open lines of communication. It didn't happen overnight, but fairly soon my profits increased, my client retention rates soared, my employees were happier, and new clients started asking to work with me! In this session you will learn how to craft simple changes to align your business model with the interests of your best clients and how to infuse the values of your best clients throughout the DNA of your firm. **(Trends & Innovation, ROI of CX)**