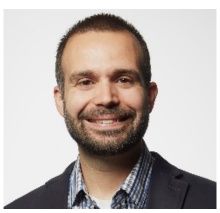
At-a-Glance: Program Overview

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 Prevent 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)**

Using Analytics to Visualize CX (Gerald Cox – Clearview Software / Nathan Moore – The Kleingers Group)

Client Experience (CX) is subjective and understanding the feedback data you get from your clients can help your firm gain insight into how they feel about your firm and the service they receive. By viewing this data as it relates to objective firm and project performance data, you can get a view of systemic problems and opportunities that can lead to significant business value. We'll walk you through how we leverage analytics to interact with our CX data and the role it can play in your CX strategy. We hope to help you answer the question so many firms ask, "We're collecting CX data, now what do we do with it?" Learn how to use analytics to visualize and explore data relationships of client experience and project performance that can drive real business decisions. **(Innovation & Ideas, Tools of the Trade)**

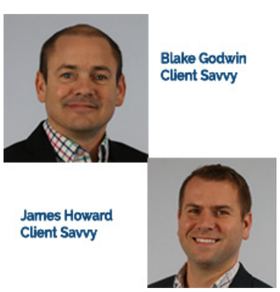
Building a CX Playbook for Your Firm (Heather Denny – Wells Global)

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)**

Activate a Promoter (Blake Godwin / James Howard –Client Savvy)



Just because your clients say they are 'likely to recommend you,' does not mean that they know how. Your job is not only to identify your firms raving fans, but to empower them to act on their desire to tell their colleagues about you and your firm. During this session we will: explore the psychology of why clients decide to recommend your firm, walk through a practical exercise you can use to "activate your promoters," and examine a case-study of a 50-person firm who experimented with the *activating a promoter* process and generated 13 opportunities with new clients in 90 days. In addition to identifying new opportunities for your firm, clients that are referred by existing 'raving fans' typical result in: higher win rates, higher margins due to built-in trust, and higher likelihood of securing clients pre-disposed to loving how you operate. **(Foundations, Client Savvy)**

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)**

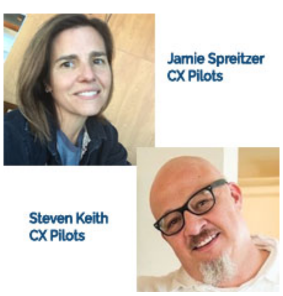
Lead Well: Creating the Energy to Lead (Becky Jacobs – Simple Change)

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, Trends & Innovation)**

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

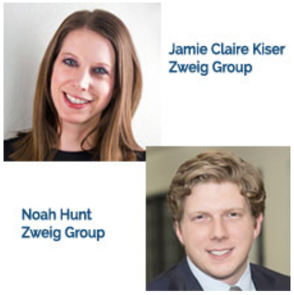
In the 10 years that GATE has been using the Client Feedback Tool (CFT), we have gone through four distinct stages. Each stage brought its challenges and each stage has taught us important lessons for success. We began with a roll-out to a single office of 20 people (our newborn phase) and are now using 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, Trends & Innovation)**

The Impacts CX and EX have on Mergers and Acquisitions (Jamie Claire Kiser and Noah Hunt – Zweig Group / Blake Godwin – Client Savvy)



Studies show that companies that make experience their business are outperforming their competition. Additionally, these experience-led companies have 1.6x higher brand awareness, 1.5x higher employee satisfaction, and 1.7x higher client retention. But what is the impact of that decision on the overall value of the firm when it comes to mergers and acquisitions. In this workshop, Jamie Claire Kiser, Noah Hunt, and Blake Godwin will discuss how client experience and employee experience impact the M&A process. You will learn where the most critical parts of the process can be affected by inconsistent CX or EX, work through your own firm's unique challenges, and leave with actionable next steps to ensure that your firm is worth what you think it is, or that the firm you are acquiring has a valid value! **(Enterprise Capability & Leadership, Client Savvy)**

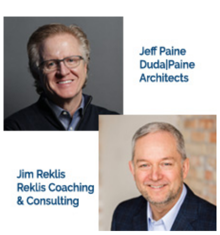
Accelerating Sales through the Delivery of Exceptional Client Experience (Deb Knupp – GrowthPlay)

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)**

Creating Peak Moments in your Client Experience Journey (Jen Newman – Zweig Group / Blake Godwin – Client Savvy)

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, Trends & Innovation)**

Core Values of CX in Action (Jeff Paine – Duda|Paine Architects / Jim Reklis – Reklis Coaching & Consulting)

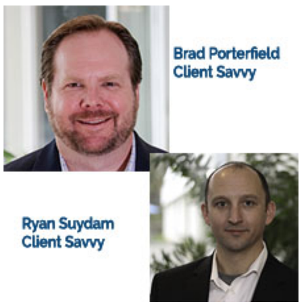


Loyal clients are not the result of happy accidents. Detailed planning, seamless teamwork, and flawless execution create loyal and satisfied clients. Clients expect more than the correct finished product. Businesses no longer compete on product quality alone, but on client experience. Exceptional CX may be your most competitive advantage. In this session, Jeff and business coach and consultant Jim Reklis will team up and share the six core values of client experience that Duda|Paine has embraced and practiced with sustainable and successful results for more than 20 years. **(Enterprise Capability & Leadership)**

Converting CX into Financial Success (Mike Phillips – Phillips Architecture)

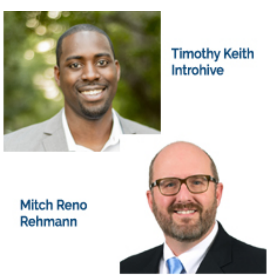
Creating a culture focused on client experience that actually delivers positive ROI requires a clear focus. With most firms focused on ways to drive profit, Phillips Architecture continues to be in an elite group of firms whose profitability continues to rise year after year by focusing on their clients. In this session, Mike will share how Phillips has structured their project delivery process to 1) identify the process needed for each project that will deliver the most value to the client, 2) provide their team with the chance to capitalize on their strengths, and 3) use client sentiment tracking to remain in alignment with what their clients perceive as most valuable. **(Enterprise Capability & Leadership, ROI of CX)**

Client Lifetime Value (Brad Porterfield / Ryan Suydam – Client Savvy)



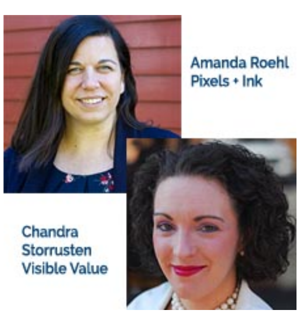
Client Lifetime Value (CLV) calculations form a critical part of understanding how to invest and where to invest in your client experience efforts. Too often, firms look at short-term indicators to quantify how valuable a client is (such as trailing 12-month profit generated). Sophisticated firms are building more accurate models of client value that factor in the total expected profit a client will generate throughout the duration of their relationship with your firm. In this session, we will present a case study of how one firm analyzed the CLV of their clients factoring in profit, churn, and client sentiment data and identified a strategy to generate $138K in future CLV for each ‘unhappy’ client converted to a ‘happy’ client. You will learn how to gather these metrics yourself and perform this analysis for your firm and quantify the return on your CX investment. **(Enterprise Capability & Leadership, Client Savvy)**

Driving CX in an Accounting Firm: A Case Study (Mitch Reno – Rehmann / Timothy Keith - Introhive)



Accounting firms have only been talking about “client experience” during the past five years. In this session, Mitch Reno, a principal from Rehmann, a $140-million firm will share how his firm built a CX program from the “inside out.” He’ll share how the firm’s integrated branding model evolved into a full-blown CX model. And, you’ll get a glimpse into how one firm created an infrastructure to create better client experience. Joining Mitch in this session is Timothy Keith, a director from Introhive. He will “pull the covers back” to share a variety of examples of how Rehmann approached the CX framework. **(Foundations)**

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



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)**

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

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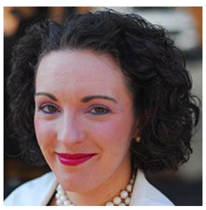
Engaging the Experience Economy to Achieve Your Strategic Goals (Chandra Storrusten – Visible Value)



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)**

Design Your Project Experience (Ryan Suydam – Client Savvy)

By 2016, 92% of Fortune 500 companies had launched a Customer Experience (CX) initiative. Today, professional service firms are increasingly realizing the importance of beginning a Client Experience effort in their own organizations. Adoption of CX within A/E/C firms is growing over 300% a year. Whether you are just getting started in your firms' adoption of CX or you're seasoned veterans, take advantage of this hands-on workshop that offers a practical approach to designing and delivering the best project ever, every time. You will leave with tools, worksheets, and a repeatable (and teachable) process. **(Tools of the Trade, Client Savvy)**

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)**