CXps 2022

connect \ learn \ collaborate

Conference Agenda

May 10 - 12, 2022

Durham Convention Center | Durham, NC

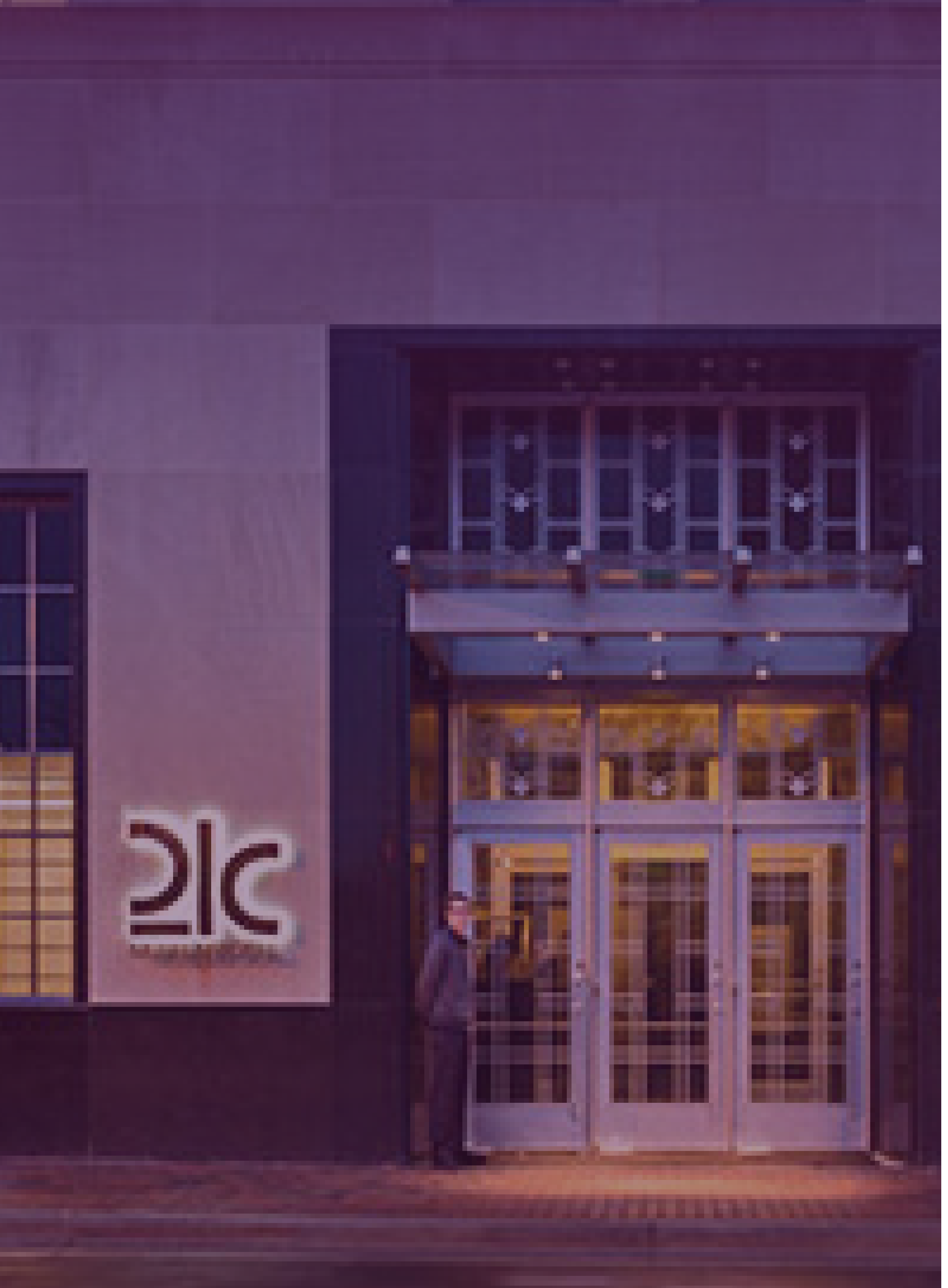
Brought to you by

CLIENT SAVVY

Welcome

MON, May 9, 2022

5:30 pm – 7:30 pm



111 North Corcoran St
Durham, NC 27701

Welcome Reception

MUSEUM HOTEL

21c Museum Hotel

Join us from **5:30 pm – 7:30 pm** for a welcome reception at Durham’s 21c Museum Hotel. A casual affair for all to mix and mingle prior to the official start of the conference.
Hors D’oeuvres will be served.

DAY 1

TUE, May 10, 2022

8:00 am – 5:45 pm

8:00 am — **Networking Breakfast**

8:30 am — **Opening Session**

The State of CX in the Industry
with **Ryan Suydam**

15 min break

9:30 am — **Breakout Session 1** SELECT ONE

OPTION 1 — A1-A2
Commoditization: The self-fulfilling prophecy for AEC firms
with **Chad Clinehens**

OPTION 2 — D1-D2
3 Pillars of a Successful CX Program
with **Jen Hertzig**

15 min break

10:45 am — **Breakout Session 2** SELECT ONE

OPTION 1 — A1-A2
Content Marketing & CX
with **Sally Obernolte & Denise Schmitz**

OPTION 2 — D1-D2
The Hidden Opportunity in your CX Program? Talent Retention
with **Carrie Steffen**

15 min break

11:55 am — **Sponsored Session**

D1-D2
CX Case Study: Why We Price the Way We Do
with **Jason P Villere** BRAYN

12:15 pm — **Awards Luncheon**

CX-cellence Award Winners & CXMP Graduation

1:00 pm — **General Session Panel**

Smart Onboarding: Getting CX, EX, & UX Aligned
with **Jen Hertzig, Mitch Reno & Gabriel Tevrizian**
and moderated by **Laura Meherg**

15 min break

2:15 pm — **Workshop Sessions** SELECT ONE

OPTION 1 — A1
Life Cycle of a Client Experience Program
with **Eddie Staley**
sponsored by zweig group

OPTION 2 — D1
Improve Service Impact with Enhanced Internal Service & Delight
with **John Goodman**
sponsored by BRAYN

OPTION 3 — A2
From Daydreaming to Globetrotting: How to Plan & Execute your CX Voyage
with **Jen Carro**
sponsored by zweig group

OPTION 4 — D2
How "Value-Adds" Drive Revenue Enabling CX
with **Deb Knupp & Matt Kocanda**
sponsored by BRAYN

15 min break

4:45 pm — **Workshop Report Out**

6:00 pm — **Evening Networking Reception**

Take Me Out to the Ballgame!
Networking Reception & Durham Bulls Game at the DBAP!

** Times are approximate and activities are subject to change*

*** All meals and sessions will take place in JR. Ballrooms B & C unless otherwise indicated*

TUE, May 10, 2022

WELCOME BREAKFAST

8:30 am – 9:15 am

The State of CX in the Industry

This opening address to CXps 2022 will set the tone for the rest of the conference by discussing the evolution of CX over the past ten years and underscoring the increasing effects a successful CX strategy plays in creating loyal, revenue-generating clients.

Ryan **Suydam**

Ryan Suydam co-founded Client Savvy in 2004, to help firms create fierce client loyalty by designing, implementing, and measuring client experiences. He has coached over 300 organizations and over 10,000 professionals on the skills required to be “client savvy.” His clients are twice as likely to be recommended by their clients, three times as likely to realize above-average financial returns, and consistently attract and retain better employees. Based in Raleigh, NC, he welcomes your questions at ryan@clientsavvy.com.

TUE, May 10, 2022

BREAKOUT SESSION 1

9:30 am – 10:30 am

SELECT ONE

Commoditization: The self-fulfilling prophecy for AEC firms

3 Pillars of a Successful CX Program

OPTION 1

Commoditization: The self-fulfilling prophecy for AEC firms

Commoditization can be a self-fulfilling prophecy in the AEC industry. Leaders must understand that if they continue to say the same thing everyone else is saying, not work hard to select the right clients, and continue working for clients where they can't be profitable – they commoditize themselves. This session will explore the tremendous opportunity to create unique and compelling brands in this industry through CX and EX approaches.

Chad **Clinehens**

Chad Clinehens is the president and CEO of Zweig Group, the leading research, publishing, and consulting firm for the architecture and engineering industry. Passionate about the business side of design and technical service firms, Chad has built a career on leading them through growth and change.

Chad has worked with AEC firms throughout North America on a variety of needs – strategic business planning, turnarounds, ownership transitions, organizational restructuring, mergers and acquisitions, marketing and sales, growth strategy, and more. As a registered professional engineer, he brings in-depth knowledge of what makes professional service firms and the people who work for them unique. Working in the industry for more than 25 years, he has been involved in many aspects of the business including design, project management, department management, regional office management, and directional leadership.

TUE, May 10, 2022

BREAKOUT SESSION 1

9:30 am – 10:30 am

SELECT ONE

Commoditization: The self-fulfilling prophecy for AEC firms

3 Pillars of a Successful CX Program

OPTION 2

3 Pillars of a Successful CX Program

When starting a new CX program it can often be confusing on where to start. This session will break down the 3 pillars of a successful CX program and how to incorporate those into your business. The outcomes and focus for each company may be unique, but the process can be broken down into three focus areas.

SEE ALSO

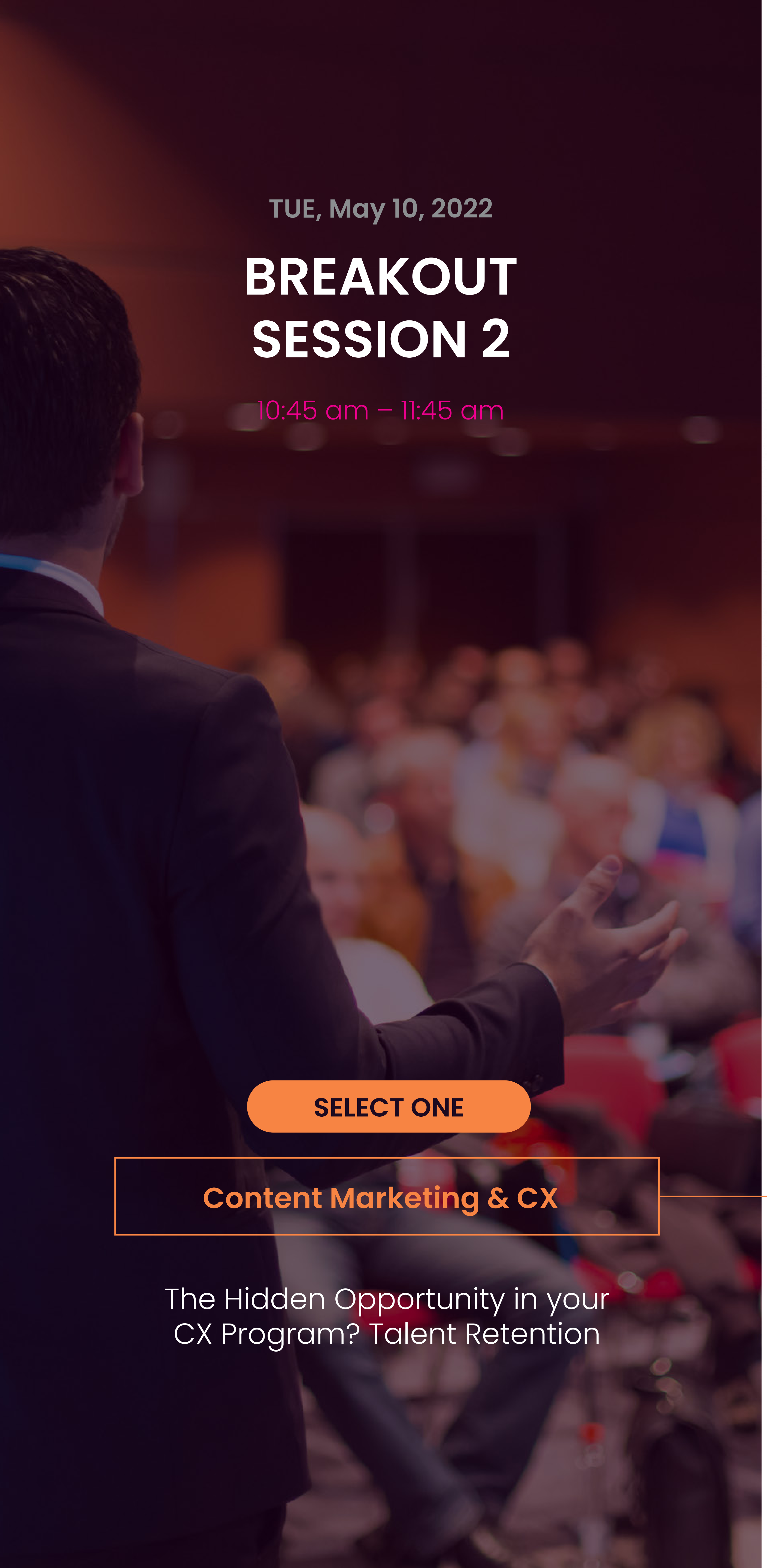
Smart Onboarding: Getting CX, EX, & UX Aligned

Jen **Hertzig**

Jen Hertzig serves the firm as brand and client experience leader, and market strategist for the non-ag markets.

As client experience leader, Jen works to create and maintain a highly collaborative culture and operating environment committed to employee engagement, client advocacy, and overall continuous improvement. Combining creativity and strategy, she also leads the firm's marketing team to connect our unique service offerings to our key industries through thought leadership and meaningful connections.

As brand leader, Jen works to align initiatives and strategies throughout the organization with the overall brand position and message. She also works hand in hand with our equipment dealer, beer distribution and community client market champions to develop market strategies for growth.



TUE, May 10, 2022

BREAKOUT SESSION 2

10:45 am – 11:45 am

SELECT ONE

Content Marketing & CX

The Hidden Opportunity in your CX Program? Talent Retention

OPTION 1

Content Marketing & CX

In 2021, the seventh year of our CX Journey, Neumann Monson Architects renewed our business plan and sharpened our focus toward a holistic approach to sales and marketing, led by client-centered content generation. Join us as we share our strategies, successes, and failures for dedicated written and video content generation that addresses every part of the sales funnel.

Sally
Obernolte

Sally is a Registered Architect with Neumann Monson Architects. She has led the firm's CX Team and client listening program for 6.5 years to build a Client Experience program that aligns with the firm's commitment to design excellence.

She strives to create empathetic and authentic experiences to differentiate, elevate, and surpass the status quo.

Denise
Schmitz

Denise has been with Neumann Monson Architects for over 20 years. She manages the firm's marketing and business development efforts and serves on the firm's CX and EX Teams.

She is currently leading NM's evolution to inbound marketing, oversees all content generation, and coordinates efforts with the firm's core seller-doer team.

TUE, May 10, 2022

BREAKOUT SESSION 2

10:45 am – 11:55 am

SELECT ONE

Content Marketing & CX

The Hidden Opportunity in your CX Program? Talent Retention

OPTION 2

The Hidden Opportunity in your CX Program? Talent Retention

Rates of burnout – a feeling of overwhelm and constant stress that if left unchecked may cause employees to seek another job – have risen in the past year. A 2021 survey by Indeed found that 54% of employees suffer from burnout-up from 43% from a year ago. Companies are taking steps to mitigate burnout and reduce turnover, but there's one surprising tool many have not considered: their CX program. CX feedback can be one of the most powerful tools in helping employees feel empowered, valued. This session explores the hidden opportunity in CX to promote a healthier workplace for employees, reduce burnout, and curb turnover. Learn the strategy behind making your CX program a significant contributor to retention, the pitfalls to avoid, and the critical mindset shift leaders must employ to drive success.

Carrie **Steffen**

Carrie is a founding shareholder and President of The Whetstone Group, Inc. Since 2000 Whetstone has provided growth consulting services to hundreds of CPA and professional service firms nationwide. She has 25+ years of professional services marketing experience and has been named a consultant to watch on Accounting Today's 100 Most Influential People in Accounting list.

Carrie helps clients determine how to best organize for growth and build a sustainable growth culture, develop comprehensive growth plans, providing ongoing support and consultation, establish accountability for business development and meet their revenue goals, and implement follow-up strategies to help manage the sales process with prospective clients and maximize their ROI on marketing.

She is also a skilled trainer and provides group sales training as well as one-on-one coaching that enables attendees to better understand the sales cycle and develop the personal skills necessary to close sales.

TUE, May 10, 2022

SPONSORED SESSION

11:55 am – 12:15 pm

sponsored by BRAYN Consulting LLC

CX Case Study: Why We Price the Way We Do

There are many common factors to consider when a company determines its pricing strategy; such as the type of service, the bids of formidable competitors, and the cost. That being said, how often do we consider the client's perspective when pricing our work? One of the many ways BRAYN Consulting continues to advance in a highly competitive industry is our unique approach to pricing strategy with the utmost respect for both our clients and competitors. This session provides an opportunity to explore a nontraditional approach to pricing that will give your company a competitive edge.

Jason **P Villere**

Jason joined BRAYN Consulting LLC in 2018 and in 2021 assumed the role as Partner and Chief Operating Officer. In his role, Jason integrates the BRAYN sales, operations, and administrative teams to drive process improvement, manage change and deliver results. As a business management professional, Jason has over 20 years' experience with treasury management, internal audit consulting, project accounting, financial reporting and managing sales teams. Jason resides in New Orleans, LA and loves the Saints, Pelicans, LSU, has an identical twin brother and has a dog named Rex.

TUE, May 10, 2022

GENERAL SESSION PANEL

1:00 pm – 2:00 pm

Jen **Hertzig**

SEE ALSO

3 Pillars of a Success-ful CX Program

Laura **Meherg**

MODERATOR

Smart Onboarding: Getting CX, EX, & UX Aligned

During this panel session, Jen Hertzig, Mitch Reno, and Gabriel Tevrizian will discuss how they are actively engaged in improving their new client onboarding protocol. You'll hear how three different firms approach the challenge of creating better client experiences at the moment new clients are optimally engaged and enthused about working with you. The panelists will share the science behind how they approached the innovation efforts and how the operational components of smart onboarding impact clients and associates. Technology will also play a starring role in this session as we look at how UX is the foundation of next-generation CX/EX. Don't miss this session if you consistently see challenges in your service delivery that could be corrected and improved with better onboarding.

Mitch **Reno**

Mitch is the guy in the CPA world that LOVES client experience. He's always eager to learn more and figure out how to help his firm take CX, EX and UX to higher levels of execution. He also like to help others. He speaks and coaches at national conference and events for fun. Mitch has consulted with a dozen top CPA firms, assisting them in developing innovative growth and client experience programs. In recent years, his firm has been recognized as one of the top CPA firms nationally providing outstanding client satisfaction.

In 2020, he was inducted into Association for Accounting Marketing's Hall of Fame. Mitch's philosophy is simple: "To grow and sustain a professional services practice, firms must build a culture and operational approaches that deliver a differentiated client and employee experience." Wanna chat? Contact him at mitch.reno@gmail.com.

Gabriel **Tevrizian**

Gabe Tevrizian is the Director of Marketing for REDW LLC, a top 200 advisory and CPA firm based in Phoenix. Gabe is a growth-minded marketing and business development executive with more than two decades of B2B and professional services experience. He drives business results through effective brand management, demand generation and client experience programs while maximizing the firm's go-to-market growth strategies. Through efficient communication and cross-functional collaboration, he leads a dynamic team accountable for creating value for the client and growth opportunities for the firm.

Before entering the accounting and advisory industry in 2010, he held Director of Marketing and Business Development positions at two Seattle-based corporate law firms.

Gabe is an active member of the Association for Accounting Marketing (AAM), currently serving as Co-chair of the Virtual Education Committee, and frequently speaks on marketing, CX, growth, and business development topics.

If you value meaningful connections, please reach out.

TUE, May 10, 2022

WORKSHOP SESSIONS

2:15 pm – 4:45 pm

SELECT ONE

Life Cycle of a Client Experience Program

How "Value-Adds" Drive Revenue Enabling CX

From Daydreaming to Globetrotting: How to Plan & Execute your CX Voyage

Improve Service Impact with Enhanced Internal Service and Delight

OPTION 1

sponsored by zweig group

Life Cycle of a Client Experience Program

Take a journey through the six phases of a client experience program life cycle and hear real-world examples of a firm's CX journey through each of these phases. Throughout the workshop, teams will brainstorm and develop a template of activities that will help build a CX program in each stage and create a wireframe of future tasks and ideas that can be shared. Participants will walk away from this workshop with a better understanding of the CX journey and future challenges, the tools to face these challenges head-on, and connections within their peer group to collaborate with in the future.

Eddie **Staley**

L. Eddie Staley, PLS, GISP is WithersRavenel's Chief Client Experience & Innovation Officer, a Professional Land Surveyor (PLS), and a certified GIS Professional (GISP) with over 25 years of award-winning project management experience. He focuses on designing, orchestrating, and improving the WithersRavenel client experience program as part of the "WithersRavenel Way". Under Eddie's leadership, WithersRavenel has been awarded the PSMJ Premiere Award for the past 5 years.

Always a surveyor and GIS professional at heart, Eddie has a passion for asset management and the benefits it provides to clients of all sizes. As the Past-President of the APWA NC Technology Division and Past-President of the APWA NC State Chapter, Eddie has helped lead the charge of Asset Management for Public Works across NC and at the national level.

TUE, May 10, 2022

WORKSHOP SESSIONS

2:15 pm – 4:45 pm

SELECT ONE

Life Cycle of a Client Experience Program

How "Value-Adds" Drive Revenue Enabling CX

From Daydreaming to Globetrotting: How to Plan & Execute your CX Voyage

Improve Service Impact with Enhanced Internal Service and Delight

OPTION 2

sponsored by BRAYN Consulting LLC

How "Value-Adds" Drive Revenue-Enabling CX

One of the biggest drivers of client loyalty is how clients receive "value-adds" as a part of the overall Client Experience. Value-Adds often come in predictable categories like client education, special events, articles, and other content access. Value-Adds can also be that extra-special something, "moment of truth" type of kindness that leaves clients moved and can stay in a client's memory for a lifetime. These are the types of moments when a client feels understood, heard, and cared for and inspire clients to proactively tell others about you/your firm. This program will provide data-driven insights across the range of categories of predictable value to transformative value and will give participants concrete rubrics and tools to provide new capacity for revenue-enabling CX at your firm. We will facilitate a series of crowdsourcing exercises with participants to generate additional ideas/best practices that can become a part of your master CX Value-Adds inventory and will be provided as a takeaway benefit to all participants of CXps 2022. We will also provide critical skill training for messaging, storytelling, and confident communication that accelerates revenue opportunities.

Deb **Knupp**

Deb Knupp is a Managing Director for GrowthPlay – a consulting firm that inspires clients to achieve their growth potential through actionable research-backed strategies accelerate revenue, improve client loyalty and motivate talent around a shared vision of success. Prior to GrowthPlay, Deb founded Akina, in 2001 that was acquired by GrowthPlay in 2014. With over 350 law firm clients and serving more than 50% of the AmLaw 200, Deb and her team at GrowthPlay have spent the last 20 years helping firms become THE place where the most profitable clients want to buy, where the most fantastic people want to work and where the most fantastic people want to work and where the most inspired leaders want to serve a bigger purpose in their communities. Before Akina, Deb was a front-line sales and HR executive working for Frito-Lay, Pearle Vision and algroup – Lawson Mardon Packaging. On a personal note, Deb graduated from The University of Texas at Austin with a B.S. in Speech/Organizational Communication. She is a passionate wife and mom to three daughters, a community cultivator and crusader for the underserved, and has a zealous commitment to help make the world better by helping others become the best version of themselves.

Matt **Kocanda**

Matt Kocanda has a desire to learn constantly. He continually applies what he learns about the investment and planning industry to help fulfill his clients' needs. Matt spends most of his time working with individuals in the finance industry, including private equity professionals, investment bankers, and asset managers. He enjoys helping his clients stay focused when life gets noisy by serving as their personal CFO. That's how he ensures the entire families' financial goals become a reality. He specifically advises creating a plan that considers cash flow, tax issues, risk management, and estate planning alongside a properly diversified investment allocation. The end goal is always to preserve and maximize assets and investments over the long term.

Alongside leading the Financial Professionals Practice Group, Matt serves as a member of the Executive Team. In this capacity, he helps drive the strategic vision for helping more people and growing BDF. He is enthusiastic about creating a great client experience that allows BDF clients live their fullest life.

SEE ALSO

Client Relationship Report Card

TUE, May 10, 2022

WORKSHOP SESSIONS

2:15 pm – 4:45 pm

SELECT ONE

Life Cycle of a Client Experience Program

How “Value-Adds” Drive Revenue Enabling CX

From Daydreaming to Globetrotting: How to Plan & Execute your CX Voyage

Improve Service Impact with Enhanced Internal Service and Delight

OPTION 3

sponsored by zweig group

From Daydreaming to Globetrotting: How to Plan & Execute your CX Voyage

Much like planning a globetrotting adventure, client experience (CX) can be daunting and overwhelming. CX is wildly complex, with implications on recruiting and engaging talent, business development, M&A, billing and fee care, and so much more. The pandemic has underscored how critical and urgent the need is to deepen our investment in CX to propel our firms forward. But, how to get started? In this fun and fast-paced session, Jennifer Carro will be your CX tour guide as she shares a case study on how Marcum LLP, a leading national accounting firm, designed its CX strategy, launched its CX program and scaled appropriately as the program matured. Jennifer will share the initial outcomes and successes of Marcum’s client experience program, and explain how the firm continues to invest in longer-term client-centric initiatives. Pack your bags, grab your passports, and meet Jennifer for a CX journey you won’t forget!

Jennifer
Carro

As the Director of Client Experience at Marcum LLP, Jennifer leads the Firm’s client experience program. She has successfully launched sustainable CX initiatives for professional services firms by fueling cultural transformation, earning client loyalty, applying innovative service approaches, and distinguishing brands through CX.

For more than 10 years, Jen has worked in collaboration with, and served as a resource to, firm leaders in the development and execution of client retention activities and cx enhancements. She has a passion for developing high quality service delivery for firms that enable revenue growth and fuel strong business relationships

TUE, May 10, 2022

WORKSHOP SESSIONS

2:15 pm – 4:45 pm

SELECT ONE

Life Cycle of a Client Experience Program

How “Value-Adds” Drive Revenue Enabling CX

From Daydreaming to Globetrotting: How to Plan & Execute your CX Voyage

Improve Service Impact with Enhanced Internal Service and Delight

OPTION 4

sponsored by BRAYN

Improve Service Impact with Enhanced Internal Service and Delight

Two aspects of the customer experience that have been ignored in most companies are delight and internal support and service. In fact, employees with empowerment and internal support are much more successful in creating delight. Most companies create “blanket empowerment”, like Ritz Carlton. This usually does not work unless supplemented with a series of examples and flexible solution spaces.

In this workshop, participants will learn to identify and quantify employee frustrations with empowerment and internal service, including how much time and money is wasted by such weaknesses. Best practices for empowerment and risk-taking, enhancing internal service where it counts the most, creating delight, getting buy-in for experimentation in all three areas, and rigorously measuring the results of your pilot tests will all be discussed and workshopped at length.

SEE ALSO

Making Delight Intentional for Measurable Payoff

John **Goodman**

Mr. Goodman is Vice Chairman of Customer Care Measurement and Consulting (CCMC). The universal adages, “It costs five times as much to win a new customer as to keep an existing one.” and “Twice as many people hear about a bad experience as a good one.” are both based on his research for the White House Office of Consumer Affairs in the 1980s. He assisted in the analysis of the 9th wave of the National Rage Study, completed in March 2020, on American consumers’ complaining behavior, service expectations, and word of mouth and led the 2021 study of customer delight.

Over the past 40 years, Mr. Goodman has managed more than 1,000 separate customer experience studies in 15 countries for 45 of the Fortune 100 as well as dozens of non-profit and government entities. His books are CX 3.0 and Strategic Customer Service.

8:00 am — **Networking Breakfast & Welcome**

8:30 am — **General Session**

CX Peer Panel Discussion
with **Tammi Nagucki, Angela Quinn, & John Rinehart**

15 min break

9:45 am — **Breakout Sessions**

A1-A2 Surprise & Delight: Enhancing CX through Low Budget/Low Effort Gifting Initiatives
with **Amber Larson**

D1-D2 What Talent War!? This is How to Conquer It and How We Did It!
with **Blake Godwin & Brock Storrusten**

15 min break

11:00 am — **BIG Ideas- General Session**

IDEA 1 Making Delight Intentional for Measurable Payoff
with **John Goodman**

IDEA 2 Client Relationship Report Card
with **Matt Kocanda**

IDEA 3 Retaining Top Talent through Succession Planning
with **Tim Schroeder**

IDEA 4 Client Sentiment & Sales Success
with **Doug Updike**

15 min break

12:15 pm — **Networking Lunch**

1:00 pm — **Keynote Discussion**

Equity & EX – A Personal Story on how to Recruit and Retain Diverse Talent
with **Leslie Miley & Vanessa Pelletier**
sponsored by zweig group

15 min break

2:15 pm — **General Session Workshop**

Leveraging the "Power of X" to WOW During Client & Employee Onboarding
with **Blake Godwin & Chandra Storrusten**
sponsored by BRAYN

4:45 pm — **Closing Discussion**

6:00 pm — **Small Group Experiences**

** Times are approximate and activities are subject to change*

*** All meals and sessions will take place in JR. Ballrooms B & C unless otherwise indicated*

WED, May 11, 2022

GENERAL SESSION

8:30 am – 9:15 am

CX Peer Panel Discussion

Join Tammi Nagucki, Principal – Marketing and Client Experience with Environmental Design Group, Angela Quinn, Chief Client Officer with Husch Blackwell, and John Rinehart, Director of Client Experience with RapidScale, to discuss where they are in their firm's CX journey, what trials and tribulations they've experienced recently within their firm's CX life cycle, what keeps them motivated to ensure their clients receive the best experience possible, and the nugget of wisdom they wish they had when they started on the crazy journey that is CX!

John **Rinehart**

John continually strives to understand the delicate balance of technical efficiency with human interaction. He has been in multiple client facing roles throughout his career leading to his current, and most satisfying role, overseeing and directing client experience for a high-growth managed cloud services company, RapidScale.

Most recently, his continued curiosity and interest in hearing from different viewpoints led him to start a new CXps national cohort that focuses on building CX programs in growth-oriented companies where the mission statement is: Continually challenge current practices. Ideate doing the improbable. Execute and refine the possible. Always balance technology with human engagement. Embrace the efforts that fall short.

Angela **Quinn**

As Husch Blackwell's Chief Client Officer, Angela ensures clients get exactly what they want and need – solutions that help them move forward, along with dynamic, creative legal service teams. As a leader in developing and implementing the firm's Legal Project Management program, she works closely with client teams to facilitate the delivery of less costly but more effective legal service. Through education and thought leadership, she ensures that all members of the firm maintain absolute focus on providing the attention, knowledge and industry insights that will help clients advance their business interests.

Angela cultivates a firm culture where team members from a variety of backgrounds feel valued and respected to fully contribute to forward-thinking strategies for clients. She understands that diverse teams secure better results.

Tammi **Nagucki**

Tammi Nagucki, a Certified, Professional Services Marketer, leads a team of marketing professionals who specialize in graphic design, videography/photography, copywriting/editing, digital marketing communications, community outreach/event planning, and campaign management.

Tammi and her team have won 6 Zweig National Marketing Awards in the past three years. As the leader for her firm in Marketing and Client Experience, Tammi also developed the company's Client Experience program which launched in 2020, and EDG Creative – a marketing and communications service for the company, which also launched in 2020

WED, May 11, 2022

BREAKOUT SESSIONS

9:45 am – 10:45 am

SELECT ONE

Surprise & Delight: Enhancing CX through Low Budget/Low Effort Gifting Initiatives

What Talent War!? This is How to Conquer It and How We Did It!

Surprise & Delight: Enhancing CX through Low Budget/Low Effort Gifting Initiatives

This session will provide three real-world examples of low budget and low effort gifting initiatives Bartlett & West undertook to enhance our client experience. First was a holiday donation email that "went viral" and earned an SMPS Kansas City 2019 Award of Excellent, Holiday Piece. Second was a 2021 client gifting and donation effort that worked so well, we saw an improvement to the company's client feedback metrics (NPS). Lastly, we will discuss a few examples of gifting and virtual events for key clients in the "new normal." Built into the session will be time for discussion and framing up attendees' own gifting initiatives.

Amber **Larson**

Amber is a senior marketing manager at Bartlett & West, which is an approximately 350-person engineering firm with offices spanning the Midwest from North Dakota to Texas. She has nearly 10 years of AEC marketing experience and decades of experience in marketing, communications and design.

She is passionate about clients and her community. Amber leads Bartlett & West's client experience efforts. She is also elected to serve on her town's City Commission and owns a Main Street building and tattoo business with her husband.

WED, May 11, 2022

BREAKOUT SESSIONS

9:45 am – 10:45 am

SELECT ONE

Surprise & Delight: Enhancing CX through Low Budget/Low Effort Gifting Initiatives

What Talent War!? This is How to Conquer It and How We Did It!

What Talent War!? This is How to Conquer It and How We Did It!

In today's climate, it's not finding the work that is so difficult, it is finding the people to do it....and the right people! We work so hard at trying to differentiate ourselves from our competitors, yet we often hire just because we need to-creating the wrong fit for both us and our clients! This can, and has, created damage to our reputations and pipelines which takes a tremendous amount of time to adjust and repair.

During this session, we will discuss how using non-traditional thinking will allow you to proactively win the talent war while improving your CX/EX! We will discuss the tools and initiatives you can put into place at your firm and discuss exactly what Withers Ravenel has done to embrace these opportunities and use them as differentiators. We will also discuss how to measure the results of these efforts, discuss potential blind spots, and help you develop a plan to create win-win-win solutions! Come find out what other firms are doing to dominate and become a preferred partner and destination employer!

Blake **Godwin**

Blake Godwin, Partner, President at Client Savvy, has helped firms of all sizes realize revenue potential through solving critical business problems for over 17 years. Through Client and Employee Experience Strategy, Blake empowers and enables his clients to capitalize on opportunities while accomplishing both short and long term Strategic Priorities. Blake Lives in the Apex, NC and holds a B.S. in Business Marketing as well as a B.S. in Business Management from the University of North Carolina Wilmington where he also played Golf. He has a 3 year old named Palmer, and a wonderful Golden Doodle named Yogi. He welcomes any questions at blake@clientsavvy.com.

SEE ALSO

Leveraging the "Power of X" to WOW During Client & Employee Onboarding

Brock **Storrusten**

Mr. Storrusten has more than 30 years of leadership in the engineering and planning industry. As Chief Strategy Officer at WithersRavenel, Mr. Storrusten leads strategy formulation and management, including corporate visioning, growth strategies, strategic planning and implementation, and leading strategic initiatives such as acquisitions, transformation, and partnerships. He also assists with innovation, organizational development, risk management, client experience, and employee experience. Beyond his development and corporate experience, he has substantial experience providing planning, engineering, and governance assistance to local governments, including serving as an Assistant City Engineer for more than 10 years and preparing financing frameworks that involved public and nonprofit grants, public bonding, other public financing, private financing, and public-private partnerships.

WED, May 11, 2022

BIG IDEAS SESSION

11:00 am – 12:15 pm

SELECT ONE

Making Delight Intentional for Measurable Payoff

Client Relationship Report Card

Retaining Top Talent through Succession Planning

Client Sentiment & Sales Success

Making Delight Intentional for Measurable Payoff

Companies view avoiding complaints and dissatisfaction as table stakes and a key objective of quality and operation. On the other hand, customer delight is seldom a clear objective and is viewed as a serendipitous event, especially in B2B environments. In fact, delight CAN be implemented systematically at a very low cost. During this session, John Goodman, Vice Chairman of Customer Care Measurement and Consulting, will present rigorous consumer research on types of delight and their payoff as well as a recent proof of concept. For example, customer education and onboarding, as well as cross-selling, can create delight while reducing problems and generating extra revenue. Goodman will then suggest how delight applies to B2B environments, including preliminary data gathered in business services and industrial settings.

John **Goodman**

SEE ALSO

Improve Service Impact with Enhanced Internal Service and Delight

Mr. Goodman is Vice Chairman of Customer Care Measurement and Consulting (CCMC). The universal adages, "It costs five times as much to win a new customer as to keep an existing one." and "Twice as many people hear about a bad experience as a good one." are both based on his research for the White House Office of Consumer Affairs in the 1980s. He assisted in the analysis of the 9th wave of the National Rage Study,

completed in March 2020, on American consumers' complaining behavior, service expectations, and word of mouth and led the 2021 study of customer delight.

Over the past 40 years, Mr. Goodman has managed more than 1,000 separate customer experience studies in 15 countries for 45 of the Fortune 100 as well as dozens of non-profit and government entities. His books are CX 3.0 and Strategic Customer Service.

WED, May 11, 2022

BIG IDEAS SESSION

11:00 am – 12:15 pm

SELECT ONE

Making Delight Intentional for Measurable Payoff

Client Relationship Report Card

Retaining Top Talent through Succession Planning

Client Sentiment & Sales Success

Client Relationship Report Card

Maya Angelou wrote that "If you don't know where you've come from, you don't know where you're going." The same sentiment holds with client relationships. Having a great handle and understanding of the history of a client relationship can often inform the forward-looking strategy. Learn how a Client Relationship Report Card can be structured to highlight the important aspects of a client relationship while also providing areas for improvement. Completing this exercise with a client team can allow for great collaboration to bring the team together and create a strategic plan for servicing the client more deeply in the coming year.

SEE ALSO

How "Value-Adds" Drive Revenue-Enabling CX

Matt **Kocanda**

Matt Kocanda has a desire to learn constantly. He continually applies what he learns about the investment and planning industry to help fulfill his clients' needs. Matt spends most of his time working with individuals in the finance industry, including private equity professionals, investment bankers, and asset managers. He enjoys helping his clients stay focused when life gets noisy by serving as their personal CFO. That's how he ensures the entire families' financial goals become a reality. He specifically advises creating a plan that considers cash flow, tax issues, risk management, and estate planning alongside a properly diversified investment allocation. The end goal is always to preserve and maximize assets and investments over the long term.

Alongside leading the Financial Professionals Practice Group, Matt serves as a member of the Executive Team. In this capacity, he helps drive the strategic vision for helping more people and growing BDF. He is enthusiastic about creating a great client experience that allows BDF clients live their fullest life.

WED, May 11, 2022

BIG IDEAS SESSION

11:00 am – 12:15 pm

SELECT ONE

Making Delight Intentional for Measurable Payoff

Client Relationship Report Card

Retaining Top Talent through Succession Planning

Client Sentiment & Sales Success

Retaining Top Talent through Succession Planning

Beyond providing a roadmap for the strategic and financial future of an organization, succession planning is an opportunity to foster a firmwide shift around transparency and engagement. Join Neumann Monson Architects for insight into how they leveraged a decade of planning and discovery to develop a 40-year succession plan offering diversified ownership to over half of their 40 person staff. Their open and inclusive process has laid the foundation for increased transparency, changed staff perception and alignment, and shifted the organizational mindset. With their 40-year plan, they've built a financially sustainable model for succession as well as a culture of engagement and ownership.

Tim **Schroeder**

Tim has practiced architecture since 1994 and was quickly established as an innovative and award-winning architect, winning the AIA's National Young Architect Award In 2008. Throughout his career, Tim excelled in increasing leadership roles, from studio leader, to principal, to COO, and President. In the past decade, Tim led transformative practices across the firm that empower staff to perform at an extraordinary level of excellence. In each of three areas—design, client partnership, and professional and community engagement—he listened carefully to identify challenges and opportunities, and empowered employees to share in leadership. In 2021, Tim facilitated the development of an innovative succession plan that will assure the firm's legacy of positive impact for future generations.

WED, May 11, 2022

BIG IDEAS SESSION

11:45 am – 12:00 pm

SELECT ONE

Making Delight Intentional for Measurable Payoff

Client Relationship Report Card

Retaining Top Talent through Succession Planning

Client Sentiment & Sales Success

Client Sentiment & Sales Success

Intuitively, we "know" that we perform better with our raving fan clients. But how much better? In this case study, hear how CDM Smith used client insights (NPS data plus proposal win rates) to quantify the impact client sentiment has on sales success. Amongst our findings, we'll share how the presence of even one "detractor" in a client organization reduced revenue capture by 37%. Armed with these insights, our BD team can be more targeted in pursuing the highest probability work, and is able to increase revenue forecast accuracy.

Doug **Updike**

Doug Updike is currently the Chief Quality Officer at CDM Smith, a privately owned engineering and construction firm that provides legendary client service and smart solutions in water, environment, transportation, energy, and facilities.

Doug believes every project starts with a strong foundation built on quality and he takes pride in his work and commitment to providing a legendary client experience.

WED, May 11, 2022

KEYNOTE DISCUSSION

1:00 pm – 2:15 pm

sponsored by zweig group

Equity & EX - A Personal Story on How to Recruit and Retain Diverse Talent

Keynote speaker Leslie Miley joins us at CXps to discuss his experiences as a Black engineer in a predominantly white, male led industry and why "diversity, equity, and inclusion" in the workplace is not another buzz term. Moderated by Vanessa Pelletier, we'll hear firsthand why, at the height of his career, Miley walked away from some of the most prestigious names in tech, and why it is important for him to continue to speak out against the barriers, systems, and preconceived notions in place that make racial, gender, and educational diversity within companies subpar and what can be done to improve inequity within the workplace.

Leslie **Miley**

Leslie Miley is a Silicon Valley native who has held executive roles at Slack, Google, Gusto, and The Obama Foundation. He has been featured in USA Today, TechCrunch Disrupt, and Wired's 2017 Next List. He advises several startups founded by women and minorities and is an investor in a fund dedicated to diverse entrepreneurs. You can reach him @shaft on Twitter.

Vanessa **Pelletier**

Vanessa is Senior Director of Branding at DAHLIN Group Architecture | Planning – a global firm a with a diversified portfolio of residential, commercial, institutional, and civic work – headquartered in the San Francisco Bay Area. As a member of DAHLIN's executive team and Board of Directors, she leads firm-wide strategy of integrated brand communications across all channels of marketing, business development and cultural activities.

Under Vanessa's leadership, DAHLIN's marketing team was honored with the 2021 Society for Marketing Professional Services (SMPS) Marketing Communications Award of Excellence in Crisis Management for their COVID-19 Client Communications Campaign. Through campaigns like this, she thrives on fostering collaborative partnerships with practice group leaders to drive brand awareness, visibility, client acquisition and retention.

Vanessa has dedicated her 20+ year career to the A/E/C industry, because of her love for design and the human-centric nature of the professional services business. She has been actively involved with professional organizations including SMPS since 2005 where she previously served as President of the SF Chapter and as Director of the Communications and Outreach & Development Committees. She currently co-leads the SF Chapter's Senior Business Leaders Forum.

sponsored by BRAYN Consulting LLC

Leveraging the "Power of X" to WOW During Client & Employee Onboarding

In this 2.5-hour workshop, you will learn how the "Power of X" can drive the creation of a successful onboarding program for both clients and employees that leave them CONSISTENTLY WOWED. Before we dive in, you will choose your own journey to focus on building an onboarding program for your employees or your clients. We will develop the goals you hope to accomplish with your program, design the roadmap and steps to get you there, and then identify and prioritize the actions that need to be taken in those steps and the stakeholders executing them. We will then determine how to measure success and how to continuously improve. Walk away from this workshop with an actionable plan for your firm to begin successfully onboarding your internal or external clients!!!

Blake **Godwin**

Blake Godwin, Partner, President at Client Savvy, has helped firms of all sizes realize revenue potential through solving critical business problems for over 17 years. Through Client and Employee Experience Strategy, Blake empowers and enables his clients to capitalize on opportunities while accomplishing both short and long term Strategic Priorities. Blake Lives in the Apex, NC and holds a B.S. in Business Marketing as well as a B.S. in Business Management from the University of North Carolina Wilmington where he also played Golf. He has a 3 year old named Palmer, and a wonderful Golden Doodle named Yogi. He welcomes any questions at blake@clientsavvy.com.

SEE ALSO

Session Title and Description Forthcoming

Chandra **Storrusten**

As CEO & Chief Value Creation Officer of Visible Value, Chandra is passionate about helping leaders and their organizations transform. She fosters sustainable value creation strategies that allow organizations around the globe to capitalize on pivotal opportunities during growth, transitions, and transformations. Chandra inspires her clients to be mission, values, and purpose-driven organizations that develop sustainable competitive advantages. She advises them on evolving opportunities and challenges in the areas of strategy, succession planning, leadership and organizational development, client and employee experience, and innovation and disruption. Her clients become innovative leaders in their industry, achieve their vision, and consistently out-perform their competition.

Activities for the day include:

8:00 am — Breakfast

Client Feedback Tool User Group Session | Networking Breakfast

Connect with peers to talk about what's working (or not) with the Client Feedback Tool. See a preview of our roadmap and the great things we have planned. Give us your feedback to help inform our plans to evolve CFT for your best use and to create the most value.

15 min break

9:00 am — General Session

Group Outing Roundtable Discussions

On Wednesday evening, you and a small group of CXps peers will choose an adventure to experience together. We have several great options you can choose from. Then, on Thursday morning, you'll have a round table discussion with your peers about the experience. A facilitator will guide the tables through a CX diagnostic to understand the experience through the lens of service design principles. These round tables will identify Critical Moments of Truth, friction points, moments of delight, and CX innovations. Then, members will prepare a CX improvement plan and prioritize key opportunities to establish an improved client experience. Finally, each table will develop a plan to communicate the new experience to the marketplace, train and hold staff accountable to deliver the new experiences, and measure the impact to the business. Each table will present their experience and improvement plan to the room. This workshop will enable each CXps member to directly practice critical skills of CX consulting they can take back to their firms.

11:30 am — Finalizing the Workshop

Final Words

For CXps members wanting additional roundtable time, we'll keep the doors open and lights on for last-minute conversation, brainstorming, and peer connections.

12:00 pm — Adjourn

**Times are approximate and activities are subject to change*

CXps

connect \ learn \ collaborate

2022

Conference Agenda

CLIENT SAVVY

answers@clientsavvy.com
hello@clientexperience.org
(866) 433-7322