CXps 2023

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Conference Agenda

May 8 - 11, 2023

Durham Convention Center | Durham, NC

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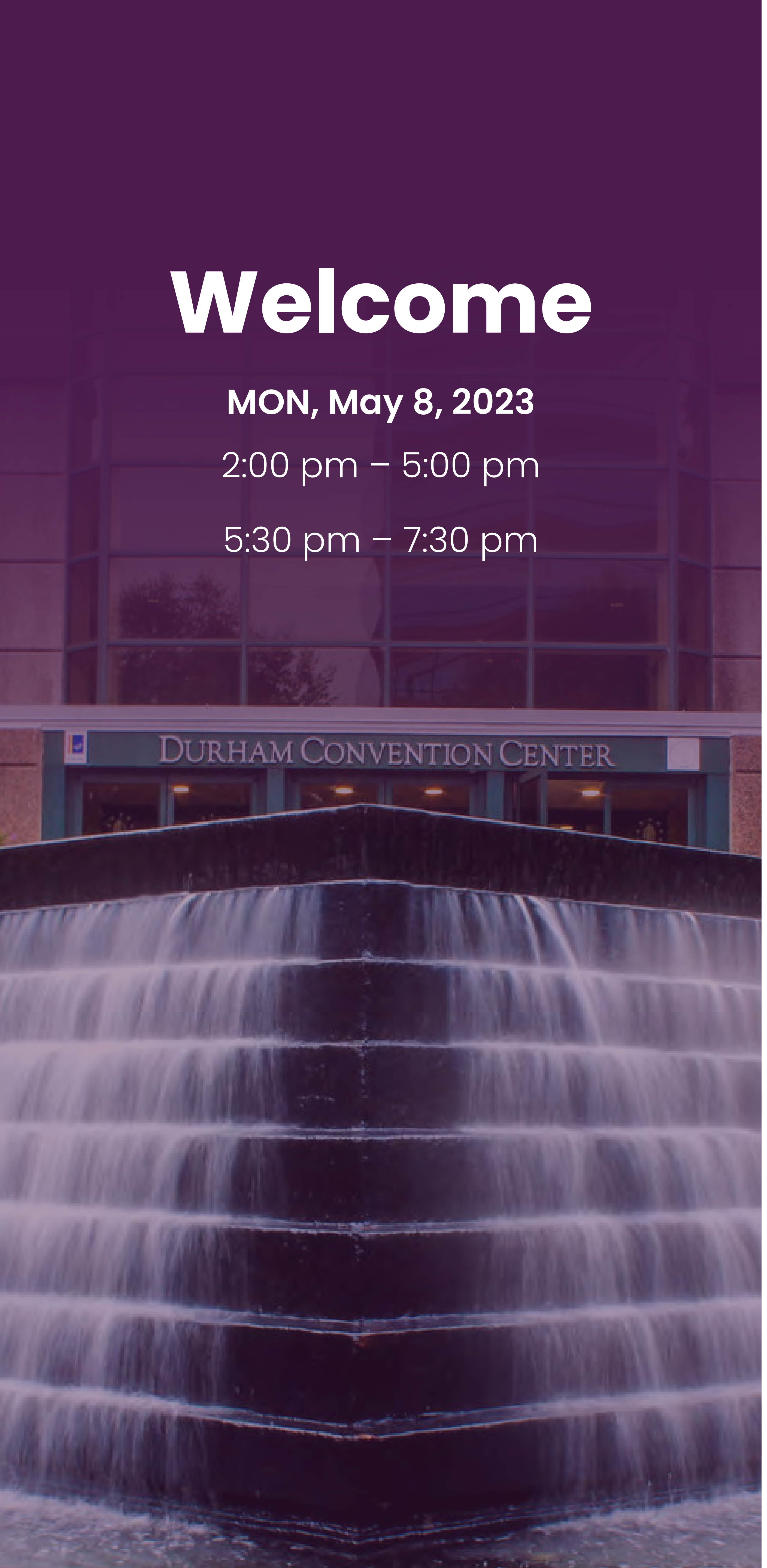

REMEDY ROOM
DURHAM ·NC·

Welcome

Mon, May 8, 2023

2:00pm – 5:00pm	**Client Feedback Tool Product** Updates, Roadmap, and User Ideation Session
5:30pm – 7:30pm	Join us from **5:30 pm – 7:30 pm** for a welcome reception at the Remedy Room, 347 West Main Street. A casual affair for all to mix and mingle prior to the official start of the conference.

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

DAY 1

TUE, May 9, 2023

8:00 am – 5:15 pm

8:00 am — **Welcome Breakfast**

8:30 am — **Opening Session**

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

15 min break

9:45 am — **Breakout Session 1** SELECT ONE

OPTION 1 — A1 & 2
"Can You Hear Me Now?" Exceptional Client Experience by Design
with **Eddie Staley & Don Mizelle**

OPTION 2 — D1 & 2
When UX Meets CX: A Website Design Journey
with **Denise Schmitz**

OPTION 3 — M3 & 4
Client Feedback Tool Advanced Topics
with **Ryanne Nelson**

15 min break

11:00 am — **Breakout Session 2** SELECT ONE

OPTION 1 — A1 & 2
Building Playbooks – Finding Efficiencies for Your Team
with **Angela Ireland**

OPTION 2 — D1 & 2
Bring Your CX and EX Into the Metaverse
with **Amanda Bruno**

OPTION 3 — M3 & 4
Putting Clients First During a Recession: The Power of Client Experience in Strategic Planning
with **Phil Keil**

10 min break

12:10 pm — **Sponsored Session** SELECT ONE

OPTION 1 — A1 & 2
The Ascent of the Tech-Forward AEC Firm and How to Become One in 2023
with **Lucas Hayden**
Unanet

OPTION 2 — D1 & 2
Connecting Your Client Feedback Tool to Your Business Applications
with **Larry Potts & Nathan Moore**
TECHNIK SOLUTIONS GROUP

OPTION 3 — M3 & 4
How Leading Firms Lead CX with Measurement and Measurable Outcomes
with **Blake Godwin**
CLIENT SAVVY

12:30 pm — **Lunch**

CX-cellence Awards Presentation & CXMP Graduation

1:30 pm — **BIG Idea Sessions**

Not Auditing Your Experience Design is Costing You Money: Here's Why
with **Michael Donnelly**

Client Experience in a Newly Developing Market
with **Danny McPhaul**

15 min break

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

OPTION 1 — A2
The Pull of Purpose: Why Winning the Talent War Requires We Define Our Work's True Value
with **Mel Lester**

OPTION 2 — M2
Moving EX & CX from Best Practice to Next Practice
with **Karen Jackson**

OPTION 3 — M3
Do the Work Today: Key Account Planning at the Enterprise and Individual Level for Maximum ROI
with **Andrea Mac**

OR — **Breakout Sessions** ATTEND BOTH

SESSION 1 — D2
How to Recognize Linguistic Discrimination
with **Jeffrey Reaser**

SESSION 2 — D2
What is an Experience Design Audit? How & When to Do One…Effectively
with **Michael Donnelly**

4:45 pm — **Daily Recap**

6:00 pm — **Networking Reception**

West End Billiards **601 West Main Street**
Join us for community, connection, and conversation! Plenty of food, drinks, and games for all!

8:00 pm

** 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 9, 2023

WELCOME BREAKFAST

8:00 am
Welcome Breakfast

8:30 am - 9:30 am
Opening Keynote

BACK TO DAY 1 OVERVIEW

The State of CX in the Industry

This opening address to CXps 2023 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 9, 2023

BREAKOUT SESSION 1

9:45 am – 10:45 am

SELECT ONE

“Can You Hear Me Now?” Exceptional Client Experience by Design

When UX Meets CX: A Website Design Journey

Client Feedback Tool Advanced Topics

BACK TO DAY 1 OVERVIEW

OPTION 1

“Can You Hear Me Now?” Exceptional Client Experience by Design

During this presentation, we will cover the outcomes of hosting a client listening workshop. We’ll discuss the challenges of putting together a workshop for clients, the “right” questions to ask, and how to best engage with your clients and provide a space for them to be open and honest. This breakout session describes how WithersRavenel enlisted clients across the market sectors we serve to better understand their needs, expectations, and how they feel during the life of their project and how our project managers worked in groups with clients to develop client journey maps for specific project types.

L. 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.

Don **Mizelle**

Don Mizelle is the Practice Area Lead for the Client Experience Manager (CXM) Team at WithersRavenel. CXMs craft a tailor-made client experience and serve as the primary point of contact for clients and their stakeholders. Don’s focus is nurturing a team of CXMs that embody the client experience (CX) fundamentals that WithersRavenel delivers on every project.

Prior to leading the CXM team, he served as Land Development lead for the firm’s Wilmington, NC, office. He has almost 30 years of combined experience in land development and planning roles and is a graduate of UNC-Wilmington. His collaborative and innovative leadership leads to higher client satisfaction on even the most complex and challenging projects.

TUE, May 9, 2023

BREAKOUT SESSION 1

9:45 am – 10:45 am

SELECT ONE

“Can You Hear Me Now?” Exceptional Client Experience by Design

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Client Feedback Tool Advanced Topics

BACK TO DAY 1 OVERVIEW

OPTION 2

When UX Meets CX: A Website Design Journey

Modern buyers—including buyers of professional services—make decisions almost entirely based on web research. We should treat our website as a primary revenue-generating tool. Until recently, our website was doing us no favors.

In this session, you’ll learn how Neumann Monson Architects transformed our website from one focused solely on aesthetics to one that is grounded in CX and UX and clearly tells our brand story. Learn how we use educational content to inform and build trust, and how fully optimizing the content maximizes impact. Denise Schmitz, head of marketing for Neumann Monson Architects, will lead you through the process and share our remarkable results nine months into this new site.

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 9, 2023

BREAKOUT SESSION 1

9:45 am – 10:45 am

SELECT ONE

“Can You Hear Me Now?” Exceptional Client Experience by Design

When UX Meets CX: A Website Design Journey

Client Feedback Tool Advanced Topics

BACK TO DAY 1 OVERVIEW

OPTION 3

Client Feedback Tool Advanced Topics

Hear from Client Savvy’s Operations Manager and the global expert in all things CFT! Ryanne Nelson (and others from our team) will walk you through tips, tricks, and best practices to help you get the most out of the Client Feedback Tool. Bring your toughest questions and be ready to share your own best practices with each other.

Ryanne **Nelson**

Ryanne Nelson is Operations Manager at Client Savvy, where she brings over 12 years of experience with processes, data and relationships within the professional services industry. Her educative and experiential knowledge of human behavior in both personal and social interactions allows her to understand the importance of unique perspectives and how each individual relates to their own client success. Her experience has given her the ability to promote a culture where a firm’s Client Experience initiatives facilitate long-term Client Relationships.

TUE, May 9, 2023

BREAKOUT SESSION 2

11:00 am – 12:00 pm

SELECT ONE

Building Playbooks- Finding Efficiencies for Your Team

Bring Your CX and EX Into the Metaverse

Putting Clients First During a Recession: The Power of Client Experience in Strategic Planning

BACK TO DAY 1 OVERVIEW

OPTION 1

Building Playbooks- Finding Efficiencies for Your Team

Every team and organization has a checklist or repeatable tasks that are applied when looking for consistency. One way to do this is organized through a "Playbook". Playbooks can be captured with everyday tools or come as modules with CX platforms. The goal and balance is keeping pace on the team as you scale your customer base; having an amazing experience for your customers and stakeholders and performing with consistency without burnout for your team. In this session, we will walk through the process of discovery to production by the Rubrik Customer Experience Manager Team as they grew from a startup team of 4 with 0 customers to a team of 20 with over 140 customers. Our key focus will be how we turned everyday checklists into Playbooks and then grew these into actions from insights based on data.

Angela **Ireland**

Angela Ireland is currently Sr. Customer Experience Manager at Rubrik Inc, where we focus on securing customer data through our backup and management platforms with a focus on resilience, observability, and remediation.

Angela has worked with helping build the team and processes at Rubrik for the past five years, starting as a team of 5 with an idea and growing to a multi-team organization providing best in class high tech and high-touch customer success models.

TUE, May 9, 2023

BREAKOUT SESSION 2

11:00 am – 12:00 pm

SELECT ONE

Building Playbooks- Finding Efficiencies for Your Team

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BACK TO DAY 1 OVERVIEW

OPTION 2

Bring Your CX and EX Into the Metaverse

Effective client experience involves engaging with both external and internal clients to build strategic partnerships. Please join Amanda M. Bruno, Global Chief Business Development Officer at Morgan Lewis, as she shares how, over the last 150 years, the firm has built an exceptional client service (ECS) culture and is now using interactive and immersive technology to simulate real-life client situations for training purposes.

Amanda **Bruno**

Amanda M. Bruno serves as the Global Chief Business Development Officer at Morgan Lewis and works with the firm's Chair and its senior leadership team to develop and execute on business development priorities aligned with the firm's objectives, including client-focused aspects of the firm's practice, industry, and strategic direction. With almost 20 years of experience in the legal industry, Amanda was the lead architect in designing and implementing the firm's Client Service Program, including the Exceptional Client Service (ECS) training, Client Feedback Program, the Client Alliance Program, the Partner Business Development Programs, and the Alumni Relations Program. Amanda serves on the firm's Diversity Committee, leads one of the Mobilizing for Equality working groups, and provides strategic focus for ML Women. She joined Morgan Lewis in 2004 as a litigation associate before moving into client service and business development roles.

TUE, May 9, 2023

BREAKOUT SESSION 2

11:00 am – 12:00 pm

SELECT ONE

Building Playbooks- Finding Efficiencies for Your Team

Bring Your CX and EX Into the Metaverse

Putting Clients First During a Recession: The Power of Client Experience in Strategic Planning

BACK TO DAY 1 OVERVIEW

OPTION 3

Putting Clients First During a Recession: The Power of Client Experience in Strategic Planning

Join us for this session to discover how focusing on client experience in your strategic plan can help your business thrive during an economic recession. We'll discuss how prioritizing customer satisfaction and loyalty can drive business growth and profitability, even in tough times. You'll learn how to identify the key elements of a successful client experience strategy during a recession, and how to align your strategic plan with your clients' changing needs. We'll also share real-life examples of companies that have successfully prioritized client experience during economic downturns.

Phil **Keil**

SEE ALSO

Navigating Uncertainty: The Power of Strategy Services in Times of Change

Through a passion to drive purpose and performance, Phil is your strategic thought-partner where he collaborates with firms to guide them toward designing and achieving their ambitions. A polymath with a diverse background in strategy, M&A, engineering, supply chain, physics, government, entrepreneurship, and R&D, he passionately provides a unique and insightful impact.

Phil began his career serving in the U.S. Air Force where he led organizational management, training, and standardization procedures for hundreds of aircraft armament systems troops. He developed sales and supply chain strategies for one of the world's largest retailers, started a medical device company based on proprietary technology treating neurological and psychiatric disorders, and managed multi-million-dollar projects for a Fortune 100 chemical company as an improvement engineer.

Phil joined Zweig Group in 2016 and has led the firm's strategy efforts as Director of Strategy since 2018. He has been instrumental in over 100 full strategic planning engagements with AEC clients of all sizes throughout the United States and globally. In addition to full research and design, Phil has also completed a significant number of additional targeted strategy and implementation projects.

Phil holds BS degrees in Chemical Engineering and Physics and an MBA with a focus on entrepreneurship and innovation. In 2017, Phil was recognized by the Northwest Arkansas Business Journal as a member of the "Fast 15" for his business and leadership accomplishments.

TUE, May 9, 2023

SPONSORED SESSION

12:10 pm – 12:30 pm

SELECT ONE

The Ascent of the Tech-Forward AEC Firm and How to Become One in 2023

Connecting Your Client Feedback Tool to Your Business Applications

How Leading Firms Lead CX with Measurement and Measurable Outcomes

BACK TO DAY 1 OVERVIEW

sponsored by Unanet

The Ascent of the Tech-Forward AEC Firm and How to Become One in 2023

Nothing fuels optimism quite like a decade of strong, sustained growth. As good as things have been for firms across AEC since the last recession, on the whole they continue to share a decidedly positive business outlook, despite the well-documented pressures from supply chain disruption to talent shortages to the escalating cost of doing business, all against the backdrop of a lingering pandemic.

There is a compelling storyline emerging amidst these challenges and success that connects a firm's embrace of technology, to its performance in key areas of the business-and its outlook for the future. Plain and simple, it pays to be a tech-forward firm and in this session Unanet's Lucas Hayden, Director of AEC Strategy will breakdown what the latest research is telling us about the performance of tech-forward firms and what it takes to become one in 2023.

Lucas **Hayden**

Lucas Hayden leads AEC Strategy for Unanet products. Unanet is built to help AEC firms do business better and Lucas, with a background in development, data, education, and client services, works to provide solutions that help firms solve problems, innovate, and refine their business processes.

SEE ALSO

Why Agile Project Management is the Future of AEC

TUE, May 9, 2023

SPONSORED SESSION

12:10 pm – 12:30 pm

SELECT ONE

The Ascent of the Tech-Forward AEC Firm and How to Become One in 2023

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BACK TO DAY 1 OVERVIEW

sponsored by TECHNIK

Connecting Your Client Feedback Tool to Your Business Applications

This industry session will focus on the feasibility of connecting your Client Feedback Tool to your CRM, ERP, and other business applications. Please join Technik Solutions Group's Nathan Moore and Larry Potts as they introduce you to the concept, provide an example of an existing integration, and discuss the benefits of sharing client feedback with other applications within your business. We look forward to seeing you there!and an M.B.A. from the University of Lynchburg, VA. He has held project management professional (PMP) certification since 2012.

Larry **Potts**

Larry is the CEO of Technic Solutions Group, a Unanet A/E Partner, providing ERP implementation and custom data services to Client's in the A/E industry since 2019. Larry personally enjoys delivering thought leadership on topics related to project management, accounting & finance, and business process improvement.

Larry began his career in the U.S. Navy serving on nuclear submarines. Post Navy, Larry worked in a variety of industries including nuclear services, public safety, government contracting, and now A&E consulting. Over the years Larry has led complex system implementations in North America and internationally and appreciates leveraging that experience for the benefit of his team and clients. Larry holds a B.S. in Physics from Miami University (Ohio) and an M.B.A. from the University of Lynchburg, VA. He has held project management professional (PMP) certification since 2012.

Nathan **Moore**

Nathan Moore is a recovering civil engineer. Having earned a bachelor's degree in civil engineering, Nathan spent nearly 25 years working as an engineer, project manager, department director, and executive leader in the A/E industry, with an ever-increasing focus on business management, organizational development, and client experience activities.

Starting in early 2022, Nathan joined the team at Technik Solutions Group, a Unanet A/E Partner, where he helps architecture and engineering firms implement and customize their enterprise resource software systems. He understands the importance of maintaining a firm's project, client, and operational information in a centralized repository and focuses on optimizing how various types of users – from project managers to firm leaders to technical staff and marketing personnel – interact with that information, providing custom solutions when needed to match each company's business requirements, preferences, and culture.

TUE, May 9, 2023

SPONSORED SESSION

12:10 pm – 12:30 pm

SELECT ONE

The Ascent of the Tech-Forward AEC Firm and How to Become One in 2023

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How Leading Firms Lead CX with Measurement and Measurable Outcomes

BACK TO DAY 1 OVERVIEW

sponsored by CLIENT SAVVY

How Leading Firms Lead CX with Measurement and Measurable Outcomes

Client Savvy was one of the first pioneers of CX in professional services, beginning our journey in 2004. CX leaders from over 600 firms using our Client Feedback Tool platform have gathered millions of CX data points since then. Equipped with actionable, timely client insights, these firms are twice as likely to achieve top-quartile business outcomes. In this session you'll learn why Client Savvy exists and how our passion for pragmatic, measurable outcomes enables our clients to succeed in growth, profitability, and retention.

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

When M&A Takes Flight: How to Reduce Turbulence & Generate First-Class M&A Experiences for Clients and Employees Alike

TUE, May 9, 2023

BIG IDEA SESSION

1:30 pm – 2:00 pm

ATTEND BOTH

Not Auditing Your Experience Design is Costing You Money: Here's Why

Client Experience in a Newly Developing Market

BACK TO DAY 1 OVERVIEW

SESSION 1

Not Auditing Your Experience Design is Costing You Money: Here's Why

Customer Experience is crucial, but, our approach to creating and facilitating impactful experience interactions is missing a key component —Auditing Your Experience Design.

We are living in the Experience Economy. A cohesive vision of a consistent concept that becomes the narrative of your story is required. Experience Design lives at the crux of Customer Experience, Branding (including your User Experience), and Employee Experience, with consideration for cultural relevance. Auditing your Experience Design is like giving yourself a video game checkpoint, creating a placeholder to check in with your progress, evaluate your alignment with your intentions, and to elevate your capacity for success.

SEE ALSO

What is an Experience Design Audit? How & When to Do One...Effectively.

Michael **Donnelly**

Michael Donnelly (she/her/hers) has been planning memorable experiences since her 7th birthday party at Leaps n' Bounds. While consulting for clients nationally on marketing initiatives, sales, sponsorship, events, operational strategy, and increasing revenue; or as Founder of FWD (For Women & Diversity) Collective, a national movement hosting professional development programming featuring women and under-represented individuals for the experts that we are rather than the boxes we check, she carries the same tenacity as her 7y/o self, leading with the idea that "business gets done when people have fun."

Michael has worked with DHL, Verizon, Intel, Urban Decay, Hair.com, Keratin Complex, L'Oréal, the American Marketing Association, Walker Sands, and a variety of SMB's and start-ups on projects ranging from shaking up 'the way things have always been done' to figuring out how to rev-up sales or launch a new concept to bring more dollars in the door. She has been the force behind building, producing, and expanding some of the Midwest's most popular large-scale tech and business events.

Michael's vibrant personality shines through in constructing creative experiences, content, and campaigns for clients, as well as in her time on camera for the re_define work series she piloted with Entrepreneur.com where Michael reported live at national events.

Michael lives in Chicago with her pup Lux, loves to standup paddle-board, serves on a few local charity and non-profit boards, and is all about the #scrappytosavvy life.

BUT, what is "Experience Design" – Experience design or XD is the practice of designing processes, services, events, omni-channel journeys, products, and environments with a focus placed on the quality of the user experience and culturally relevant solutions. Michael's expertise is marrying marketing, business development, operations, and real-life experiences/events to create a meaningful impact for your brand and bottom line.

TUE, May 9, 2023

BIG IDEA SESSION

1:30 pm – 2:00 pm

ATTEND BOTH

Not Auditing Your Experience Design is Costing You Money: Here's Why

Client Experience in a Newly Developing Market

BACK TO DAY 1 OVERVIEW

SESSION 2

Client Experience in a Newly Developing Market

Learn how client experience has been leveraged to guide complex client journeys in a newly developing market. We'll share insights and lessons learned from real-world examples, highlighting the importance of prioritizing client experience in the face of unique challenges and opportunities. Whether you're operating in a similar market or just interested in the role of client experience in business, this session is sure to provide valuable insights and inspiration.

Danny **McPhaul**

Danny McPhaul, Manager of Client Experience at Ford Pro, leads a team of enthusiastic Client Success Managers in the quickly expanding market of Electric Vehicle charging. Having over 20 years of client experience, Danny has cultivated a unique way of building in-depth relationships with his various clients. His experience in managing elite-level client relationships on behalf of Cisco Systems, and Verizon Business, as well as Ivy League universities during his tenure at TransLoc, has given him the opportunity to perfect the art of weaving a personal brand into any business relationship. Upon expanding and improving on several high-visibility client relationships at TransLoc as a CSM, he was promoted to the manager of Client Experience, where he led his team to improve the company's overall NPS score by 27%.

He brings this same energy to his leadership at Ford Pro, as he builds the foundation of the freshly formed Client Success team to take on the challenges of the newly developing world of Electric Vehicles and ensure that Ford Pro's client base receives best-in-class level client success. He's also a huge fan of the Golden Girls, and it's almost impossible to catch him not wearing a t-shirt showcasing those fabulous ladies. He's intrigued and impressed several clients and colleagues with his uncanny ability to weave a reference or two to the Golden Girls in almost any situation.

TUE, May 9, 2023

WORKSHOP SESSIONS

2:00 pm – 4:45 pm

SEE BREAKOUT SESSIONS

SELECT ONE

The Pull of Purpose: Why Winning the Talent War Requires We Define Our Work's True Value

Moving EX & CX from Best Practice to Next Practice

Do the Work Today: Key Account Planning at the Enterprise and Individual Level for Maximum ROI

BACK TO DAY 1 OVERVIEW

OPTION 1

The Pull of Purpose: Why Winning the Talent War Requires We Define Our Work's True Value

A growing body of research indicates that a sense of purpose is one of your firm's best assets for attracting and retaining talent. Fortunately, our profession does purposeful work. But often, especially among technical professionals, the true value of our work is unwittingly downplayed. We focus on solutions rather than outcomes. We emphasize our services instead of delivering client business value. In this session, we're going to explore opportunities to unlock greater purpose in our workplaces. We'll examine the business case for purpose at work. We'll look at examples of how firms, particularly in the A/E industry, undermine purpose in how they describe what they do. And together, we'll come up with strategies for making purpose at work a strength in our ability to win the talent war.

Mel **Lester**

Mel Lester is a management consultant, trainer, and contrarian strategist specializing in helping engineering, environmental, and architectural firms create competitive advantage and improve business performance. He has a wealth of diverse management and consulting experience, encompassing strategy and leadership development, business development, client experience, human resources, project delivery, quality management, behavior-based safety, corporate communications, and executive coaching. Mel and his wife Dena live in rural southwest Virginia.

TUE, May 9, 2023

WORKSHOP SESSIONS

2:00 pm – 4:45 pm

SEE BREAKOUT SESSIONS

SELECT ONE

The Pull of Purpose: Why Winning the Talent War Requires We Define Our Work's True Value

Moving EX & CX from Best Practice to Next Practice

Do the Work Today: Key Account Planning at the Enterprise and Individual Level for Maximum ROI

BACK TO DAY 1 OVERVIEW

OPTION 2

Moving EX & CX from Best Practice to Next Practice

This interactive, fast paced workshop will highlight proven, time tested, tips, tools, and techniques designed to accelerate the culture change that helps capture the hearts and minds of both employees and customers. Attendees will learn the critical success factors that enable organizations to move beyond best practice to next practice in terms of Employee Experience (EX) and Customer Experience (CX).

Karen L. **Jackson**

Karen L. Jackson is the Managing Partner at C-ChangeWork. She has over 20 years of leadership experience designing game changing business strategies that deliver sustainable competitive advantage and increased profitability. She is the architect of CX methodologies that resulted in unprecedented levels of customer success as measured by NPS, CSAT and business performance. Her career spans multiple industry verticals and her work has taken her beyond the U.S. to South Africa, Sweden, Poland, Japan, Malaysia, Netherlands, France, Belgium, Denmark, Australia, Singapore, Japan, Germany and the UK.

TUE, May 9, 2023

WORKSHOP SESSIONS

2:00 pm – 4:45 pm

SEE BREAKOUT SESSIONS

SELECT ONE

The Pull of Purpose: Why Winning the Talent War Requires We Define Our Work's True Value

Moving EX & CX from Best Practice to Next Practice

Do the Work Today: Key Account Planning at the Enterprise and Individual Level for Maximum ROI

BACK TO DAY 1 OVERVIEW

OPTION 1

Do the Work Today: Key Account Planning at the Enterprise and Individual Level for Maximum ROI

80% of your revenue will come from 20% of your customers.

Account planning is an essential part of any business strategy, and it involves understanding the customer's needs and developing a plan to meet those needs. In addition, effectiveness relies on team alignment and acting in an intentional and customer-centric way.

This workshop is about effective key account planning for maximum ROI at the enterprise and individual levels. Participants will learn about identifying high-value accounts, developing customized strategies, and building strong relationships with key stakeholders utilizing Prequal's framework. This practical and actionable session provides attendees with tools and techniques for success.

Andrea **Mac**

Andrea Mac is an accomplished growth strategist known for being ambidextrous in the fusion of creativity and business acumen. She has a proven track record of generating revenue through Marketing, Sales, and Client Development Programs.

She founded Prequal to generate sustainable revenue opportunities for businesses through creative problem-solving to build new brands and business models, attract new audiences, secure sales opportunities with increased wins, and transform customer experiences.

She has a long career trajectory in the professional services field, and her work has been covered by Inc Magazine, Forbes, Crain's, MarketingProfs.com, The ABA Journal, The National Law Journal, and various industry publications. She welcomes new connections, so please reach out.

SEE ALSO

CX and Sales: Leveraging Your CX Efforts/ Programs During the Pitch Process to Attract More Clients, Win More Deals, and Accelerate Revenue

ATTEND BOTH

How to Recognize Linguistic Discrimination

What is an Experience Design Audit? How & When to Do One…Effectively.

BACK TO DAY 1 OVERVIEW

SESSION 2

How to Recognize Linguistic Discrimination

The 55 years since the Civil Rights Act was passed have witnessed a profound societal shift with respect to diversity. Forced integrated gave way to tolerance, which eventually transitioned into appreciation of difference, and has most recently transformed into rhetoric that posits diversity should be celebrated as a strength in communities, schools, and businesses. We also have a collectively understood canon of diversity extending from the legally protected categories of "race, religion, national origin, sex, handicap, and family status" to other related categories, such as socioeconomic class and sexuality. Absent from this canon is language. In fact, in many cases, it is still legal to discriminate against people on the basis of language or dialect.

The issue – which serves as the starting point for this session – is that language never operates independently of the other categories of diversity we claim to value, but instead, serves as a proxy by which we enact the standard language ideology that we have been steeped in, and manifest implicit biases that insidiously discriminate against minoritized groups and individuals.

Jeffrey **Reaser**

Jeffrey Reaser is professor of English linguistics at NC State University, where he directs the English teacher education and linguistics programs, and co-directs the Language and Life Project. He has written four books, including Talkin' Tar Heel and Dialects at School, and more than twenty research articles. He has been recognized for his outstanding research, teaching, advising, and mentoring, including the 2014 North Carolina Book Award, NC State's Lifetime Undergraduate Research Mentoring Award, and the 2020 National Council of Teachers of English award for outstanding research. He has also worked on numerous documentary projects, including the Emmy-winning program, Talking Black in America.

TUE, May 9, 2023

BREAKOUT SESSIONS

2:00 pm – 4:45 pm

SEE WORKSHOP SESSIONS

ATTEND BOTH

How to Recognize Linguistic Discrimination

What is an Experience Design Audit? How & When to Do One…Effectively.

BACK TO DAY 1 OVERVIEW

SESSION 2

What is an Experience Design Audit? How & When to Do One…Effectively

This breakout session will take a deeper dive into exploring the elements of Auditing your Experience Design and give you the tools you'll need to get started in real time.

SEE ALSO

Not Auditing Your Experience Design is Costing You Money: Here's Why

Michael **Donnelly**

Michael Donnelly (she/her/hers) has been planning memorable experiences since her 7th birthday party at Leaps n' Bounds. While consulting for clients nationally on marketing initiatives, sales, sponsorship, events, operational strategy, and increasing revenue; or as Founder of FWD (For Women & Diversity) Collective, a national movement hosting professional development programming featuring women and under-represented individuals for the experts that we are rather than the boxes we check, she carries the same tenacity as her 7y/o self, leading with the idea that "business gets done when people have fun."

Michael has worked with DHL, Verizon, Intel, Urban Decay, Hair.com, Keratin Complex, L'Oréal, the American Marketing Association, Walker Sands, and a variety of SMB's and start-ups on projects ranging from shaking up 'the way things have always been done' to figuring out how to rev-up sales or launch a new concept to bring more dollars in the door. +She has been the force behind building, producing, and expanding some of the Midwest's most popular large-scale tech and business events.

Michael's vibrant personality shines through in constructing creative experiences, content, and campaigns for clients, as well as in her time on camera for the re_define work series she piloted with Entrepreneur.com where Michael reported live at national events.

Michael lives in Chicago with her pup Lux, loves to standup paddle-board, serves on a few local charity and non-profit boards, and is all about the #scrappytosavvy life.

BUT, what is "Experience Design" – Experience design or XD is the practice of designing processes, services, events, omni-channel journeys, products, and environments with a focus placed on the quality of the user experience and culturally relevant solutions. Michael's expertise is marrying marketing, business development, operations, and real-life experiences/events to create a meaningful impact for your brand and bottom line.

DAY 2

WED, May 10, 2023

8:00 am – 5:00 pm

8:00 am — **Breakfast**

8:30 am — **Overview of the day & workshop pitches**

8:45 am — **Workshop Sessions** SELECT ONE

OPTION 1 M2
Extraordinary Employee Experience – One Thing to Rule Them All
with **John Doehring**

OPTION 2 A2
When M&A Takes Flight: How to Reduce Turbulence & Generate First-Class M&A Experiences for Clients and Employees Alike
with **Blake Godwin & Tammy Nagucki**

OPTION 3 M3
Is your Organizational Architecture Aligned with Your CX and EX Strategy?
with **Kristi Weierbach**

OR — **Breakout Sessions** ATTEND BOTH

SESSION 1 D2
Not Winning the Talent War? Start Thinking of Your Candidates and Employees as Customers
with **Ida Cheinman**

SESSION 2 D2
Websites & EX: Proven User Experience Strategies for Engaging Top Talent
with **Tim Asimos**

10 min break

11:25 am — **Sponsored Session** SELECT ONE

OPTION 1 A2
Why Agile Project Management is the Future of AEC
with **Lucas Hayden**
Unanet

OPTION 2 M2
Struggling with the Idea of Selling Your Business? Here is an Inside Look at the Seller's Experience
with **Michael Hein & Mike Kroll**
HFW

OPTION 3 D2
Navigating Uncertainty: The Power of Strategy Services in Times of Change
with **Tom Godin & Phil Keil**
zweig group

11:45 am — **Networking Luncheon**

12:45 pm — **BIG Idea Sessions & Mini General Session**

Building a Client Experience Culture
with **Stephanie Koeninger**

Beyond the Hype: Real Ways to Utilize AI in Your CX
with **Greg Kihlstrom**

Optimizing CX through Client Assessments
with **Dan Herbener**

CX and Sales: Leveraging Your CX Efforts/Programs During the Pitch Process to Attract More Clients, Win More Deals, and Accelerate Revenue
with **Andrea Mac**

15 min break

2:15 pm — **General Session CXO Panel Discussion**

Do You Aspire to Lead CX from the Executive Table?
with **Sidney Abrams, Dan Herbener, Mallory Beaton & Carl Winstead**

15 min break

3:30 pm — **BIG Idea Sessions & Mini General Session**

High-Octane Success: Maximizing Opportunities to Create an Extraordinary Client Event
with **Joan Hamrick**

Making Client Experience a "Hard Skill"
with **Desi Podkowka**

Helping Customers Rationally Evaluate Risk
with **John Goodman**

4:30 pm — **Daily Recap**

5:30 pm — **CX Group Outings**

WED, May 10, 2023

WORKSHOP SESSIONS

8:45 am – 11:15 am

SEE BREAKOUT SESSIONS

SELECT ONE

Extraordinary Employee Experience - One Thing to Rule Them All

When M&A Takes Flight: How to Reduce Turbulence & Generate First-Class M&A Experiences for Clients and Employees Alike

Is your Organizational Architecture aligned with your CX and EX Strategy?

BACK TO DAY 2 OVERVIEW

OPTION 1

Extraordinary Employee Experience - One Thing to Rule Them All

Are you tired of the same old talk of employee satisfaction and engagement? Worn out with new programs to bring more fun, energy, and collaboration to work? Want to know the real secret to extraordinary employee experience – and extraordinary professional firm success?

Business today in the professions is good: strong economy, flush backlogs, record profits – but still, something is very, very wrong. Many are demotivated, demoralized, and – dead tired. Generational misconnection is real, and staff engagement is stuck, while voluntary turnover is 2X the norm. WTF?

What's needed is a fresh, all new, transformational approach to designing employee experience. Working with professional firms of all types (from large to small, highly diversified to niche specialists, around the block to around the world) we've mapped out the path to success – strategies, actions, and cultures that lead to truly extraordinary employee experience – and lasting competitive advantage.

Please join us for this, engaging, entertaining, high-energy workshop – and discover the ideas, insights, and inspirations behind extraordinary employee experience – the one, true thing to rule all other things. Your own journey – to extraordinary professional firm success – begins here.

John **Doehring**

John Doehring is an accomplished speaker, author, and certified management consultant. Founder of J. Doehring & Co. – John advises executive leaders on business strategy, leadership development, and operations transformation. Clients range from large to small, broadly-diversified to niche-specialist, around-the-block to around-the-world. John's passion is helping professionals to design their future, grow their business, and make more money!

John is the author of Fast Future! Ten Uber-Trends Changing Everything in Business and Our World and The BackPocket Business Plan! Outrageously Simply Business Planning for Extraordinary Business Results. Alongside of his highly energizing client work, he is today working on a new book detailing how Fast Future-focused leaders, and exceptionally engaged professional teams, work to build an Extraordinary Professional Firm.

WED, May 10, 2023

WORKSHOP SESSIONS

8:45 am – 11:15 am

SEE BREAKOUT SESSIONS

SELECT ONE

Extraordinary Employee Experience - One Thing to Rule Them All

When M&A Takes Flight: How to Reduce Turbulence & Generate First-Class M&A Experiences for Clients and Employees Alike

Is your Organizational Architecture aligned with your CX and EX Strategy?

BACK TO DAY 2 OVERVIEW

OPTION 2

When M&A Takes Flight: How to Reduce Turbulence & Generate First-Class M&A Experiences for Clients & Employees Alike

M&A these days is much like the airline industry: rarely does all go according to plan, and when it does, we are pleasantly surprised.

On average, client churn increases 60% after an acquisition, and most firms spend six figures replacing key employees lost to poor M&A integration. Often the prospect of M&A activity (and the feeling you get when you book your plane ticket) is a lot more satisfying than the experience itself. It doesn't have to be! We know there is a better way to retain our clients and employees along their M&A journey.

This workshop will unpack the common pitfalls of business combinations, address opportunities for first-class M&A experiences and demonstrate ways to prepare your firm for future M&A flights.

During this session, attendees will learn how to create and capture business value, uncover the common employee and client experience pitfalls via M&A, identify the role of empathy mapping in the M&A process, discover the key stages of mergers and acquisitions and a checklist of ways to prepare for each stage, hear a piloted M&A integration case study and lessons learned, access M&A integration tools to utilize for reduced client churn and employee attrition.

SEE ALSO

How Leading Firms Lead CX with Measurement and Measurable Outcomes

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.

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 10, 2023

WORKSHOP SESSIONS

8:45 am – 11:15 am

SEE BREAKOUT SESSIONS

SELECT ONE

Extraordinary Employee Experience - One Thing to Rule Them All

When M&A Takes Flight: How to Reduce Turbulence & Generate First-Class M&A Experiences for Clients and Employees Alike

Is your Organizational Architecture aligned with your CX and EX Strategy?

BACK TO DAY 2 OVERVIEW

OPTION 3

Is your Organizational Architecture Aligned with your CX and EX Strategy?

The Organizational Architecture of a firm when effectively designed will attract both employees and clients. When it is poorly designed it will cause confusion, frustration, and ultimately negatively impact the experience for both employees and clients. In this session, you will learn about the 5 key components of Organizational Architecture and the steps you can take to leverage them to achieve your EX and CX Strategies.

Kristi **Weierbach**

Kristi focuses her extensive expertise on helping clients design a workforce that is not only prepared for the future, but one that leverages disruption to thrive and succeed. Weaving together a unique blend of anticipatory tools and insights with practical solutions, Kristi provides clients with an organizational architecture that empowers them for the NextGen.

Applying deep workforce knowledge, Kristi helps companies overcome challenges by providing strategic direction, implementing and improving policies and procedures, and skillfully turning human capital management into a competitive advantage.

Kristi has earned her Ph.D. in Organizational Management with a specialization in HR from Capella University and obtained numerous professional certifications including becoming a Senior Professional in Human Resources (HR Certification Institute) and an SHRM Senior Certified Professional (Society for Human Resource Management).

Kristi is an active blogger and frequent presenter on workforce and NextGen-related topics.

Make sure to ask her about the time her palms were scanned at the airport!

WED, May 10, 2023

BREAKOUT SESSIONS

8:45 am – 11:15 am

SEE WORKSHOP SESSIONS

ATTEND BOTH

Not Winning the Talent War? Start Thinking of Your Candidates and Employees as Customers

Websites & EX: Proven User Experience Strategies for Engaging Top Talent

BACK TO DAY 2 OVERVIEW

SESSION 1

Not Winning the Talent War? Start Thinking of Your Candidates and Employees as Customers

The challenge: Great resignation. Quiet quitting. Disengagement at work. The war on talent. The statistics are staggering and not in the employers' favor.

The solution: Start thinking of candidates and employees as customers and apply innovative marketing/BD principles to attract, hire, engage, and retain employees as you do with clients.

The result: A full pipeline of better-qualified "ideal" candidates, a seamless hiring and onboarding experience, and much higher rates of employee engagement, satisfaction, and advocacy.

The session is designed to show how applying modern marketing principles to every step in the employee journey – from a candidate to a new hire to a brand ambassador – will drive positive results for your firm. Attendees will walk away with a new playbook to help them leverage demographic shifts and digital transformation to help their firms attract and keep top talent.

Ida **Cheinman**

Ida Cheinman is Principal and Creative Director of the brand strategy, design, and digital firm Substance151.

Ida uses her 25 years of experience as a brand strategist, designer, marketer, and educator to help business leaders and marketing professionals make sense of trends, tools, and best practices in order to position their firms to win in the 21st century's fast-changing and extremely competitive marketplace.

At Substance151, Ida leads a multi-disciplined team in all steps of the branding process – from strategy through design, across print and digital, and covering all aspects of marketing communications. Her work has earned numerous awards and industry recognition and has been published nationally and internationally.

Ida is a sought-after speaker who is knowledgeable, energetic, and excels at making complex information accessible and immediately applicable. She has presented for professional services organizations and branding and marketing conferences nationwide and is a frequent contributor to industry webinars, blogs, podcasts, and publications.

WED, May 10, 2023

BREAKOUT SESSIONS

8:45 am – 11:15 am

SEE WORKSHOP SESSIONS

ATTEND BOTH

Not Winning the Talent War? Start Thinking of Your Candidates and Employees as Customers

Websites & EX: Proven User Experience Strategies for Engaging Top Talent

BACK TO DAY 2 OVERVIEW

SESSION 2

Websites & EX: Proven User Experience Strategies for Engaging Top Talent

One of the earliest touchpoints in the employee journey is your website. While often overlooked in the EX equation, a professional service firm's website is arguably their most valuable asset at the onset of the experience journey—or at least it should be! More than two-thirds of job seekers visit a firm's website before applying and nearly 90% believe it's essential for finding key information. A site that successfully attracts top talent differentiates, tells your firms' story, and engages candidates by providing an exceptional user experience. However, many websites lack the essentials to effectively meet the needs of users and create a best-in-class experience.

So how can you turn yours into a talent magnet that begins the EX journey with an impactful first impression? During this session, we will share innovative ideas that can transform a website into a dynamic recruitment machine. Leveraging his extensive experience in professional services web development, Tim will share case stories and real-world examples, offer practical tips and tricks, answer FAQs, and give attendees actionable takeaways for optimizing their websites for EX and talent acquisition. Attendees will discover the latest website best practices that drive a best-in-class employee experience, understand the criteria and metrics to evaluate the effectiveness of their firm's website, identify vital content, functionality, and design elements essential to maximizing impact, recognize fundamental changes and website enhancements they should make immediately, and learn how to make the business case for your website upgrades.

Tim **Asimos**

Tim is a partner at circle S studio, a Richmond-based strategic marketing, branding, and digital agency. Leading circle S studio's digital team, he develops innovative strategies in website development, content marketing, lead generation, account-based marketing, client experience, and marketing technology. Tim's unique perspective is based on nearly 20 years of experience in corporate B2B marketing, including six years in the A/E/C industry—which means he's walked in the same shoes as many of his clients. He also steers growth for the agency, with a focus on marketing and business development, new client acquisition, and thought leadership.

Tim is also a national speaker and syndicated blogger on all things marketing, branding, digital and business development. He's a member of the American Marketing Association and a Past President of the Richmond chapter, an SMPS Member and Certified Professional Services Marketer (CPSM), and his A/E/C industry expertise has been featured in numerous publications, webinars, programs, and conferences across the country. Tim holds a bachelor's degree in Communication Studies and an MBA from Liberty University.

WED, May 10, 2023

SPONSORED SESSIONS

11:25 am – 11:45 am

SELECT ONE

Why Agile Project Management is the Future of AEC

Struggling with the Idea of Selling Your Business? Here is an Inside Look at the Seller's Experience

Navigating Uncertainty: The Power of Strategy Services in Times of Change

BACK TO DAY 2 OVERVIEW

sponsored by Unanet

Why Agile Project Management is the Future of AEC

The AEC industry is bursting with opportunity. And capturing that growth and profitability demands strong project management skills. While it can be difficult for AEC firms to adapt their methods of project management to the ever-changing needs of clients with agile project management, this is all about to change. Agile project management allows for more flexibility in both the planning process and in how projects are executed. Join Unanet's Lucas Hayden, Director of AEC Strategy as he discusses why agile project management practices have become the future for AEC and steps you can take today to increase your Agile IQ.

Lucas
Hayden

Lucas Hayden leads AEC Strategy for Unanet products. Unanet is built to help AEC firms do business better and Lucas, with a background in development, data, education, and client services, works to provide solutions that help firms solve problems, innovate, and refine their business processes.

SEE ALSO

The Ascent of the Tech-Forward AEC Firm and How to Become One in 2023

WED, May 10, 2023

SPONSORED SESSIONS

11:25 am – 11:45 am

SELECT ONE

Why Agile Project Management is the Future of AEC

Struggling with the Idea of Selling Your Business? Here is an Inside Look at the Seller's Experience

Navigating Uncertainty: The Power of Strategy Services in Times of Change

BACK TO DAY 2 OVERVIEW

sponsored by HFW

Struggling with the Idea of Selling Your Business? Here is an Inside Look at the Seller's Experience

Selling a business can be a tricky and daunting process. For many owners, it's like walking a tightrope without a safety net. With so much at stake and multiple factors to consider, it's hard to know which path is best for you and your company. HFW provides valuable insight into the sale process from the seller's perspective. Business owners can learn from experts who have been through the same situation before by sharing their best practices so the seller can be better prepared. This industry session will provide invaluable insight for anyone considering selling their business and looking for assistance with the selling process.

Michael **Hein**

Michael is a founding partner of The HFW Companies and brings 42 years of experience from the AEC industry to the company. As CEO, Michael leads, manages, and is accountable for driving the company's vision and culture, fostering its big ideas, mapping out the strategic plan, and removing obstacles that threaten to disrupt the company's success.

Michael's broad experience in the AEC industry has allowed him to develop a deep understanding of the design and construction process and firm operations management. Having been involved in over 25 M&A transactions, he has deep knowledge of the value of acquisitive growth.

He is a licensed architect in 13 states and holds a Project Management Professional (PMP) certification from the Project Management Institute (PMI).

Michael obtained his Bachelor of Science in Geography with an emphasis in cartography and economic development from the University of Wisconsin – Eau Claire. He received a Bachelor of Architecture from The City College of New York (CCNY) and a Master of Urban Planning/Architecture from The Graduate Center, City University of New York (CUNY).

Mike **Kroll**

Michael Kroll, RLA, FASLA, President of Miller Legg, has been actively involved in designing and developing projects ranging from large-scale natural habitat restoration to international urban redevelopment projects. His 35-year career has concentrated on planning, infrastructure, open space, transportation, and redevelopment, principally in Florida.

Mr. Kroll's diverse professional experience has led to projects integrating environmental, planning, landscape architecture, and civil engineering services. Under his leadership, Miller Legg continues to build upon 58+ years of client relationships and project solutions that respond to the natural environment, respect the social fabric and create sustainable aesthetic spaces. Miller Legg joined The HFW Companies as a member firm in 2021.

WED, May 10, 2023

SPONSORED SESSIONS

11:25 am – 11:45 am

SELECT ONE

Why Agile Project Management is the Future of AEC

Struggling with the Idea of Selling Your Business? Here is an Inside Look at the Seller's Experience

Navigating Uncertainty: The Power of Strategy Services in Times of Change

BACK TO DAY 2 OVERVIEW

sponsored by zweig group

Navigating Uncertainty: The Power of Strategy Services in Times of Change

With the business landscape constantly shifting, it's more important than ever to have a clear and adaptable strategy. But how do you develop a winning strategy when the future is uncertain? In this session, we'll explore the role of strategy services in helping you navigate times of change. We'll discuss strategies for analyzing market trends, identifying new opportunities, and developing agile plans that can adapt to unexpected challenges. Whether you're a seasoned executive or a startup founder, this session will provide valuable insights into how to stay ahead of the curve and thrive in uncertain times.

Tom **Godin**

Tom joined Zweig Group after a 19-year career as the Chief Operating Officer of a Washington DC-based engineering company. In that role, he was responsible for the business operations of a multi-office firm, to include oversight of the finance, accounting, human resources, information technology, facilities, and legal functions. Tom was a member of the firm's Executive Committee and helped guide it through two economic shocks (the 2008 Great Recession and the 2020 Covid Crisis), an ownership transition from founders to the 2nd generation of leaders, and periods of high growth.

Prior to this, he held operations and management roles in the telecommunication industry and served on active duty as a nuclear power-trained Submarine Warfare Officer in the United States Navy.

Systems thinking is a particular area of interest for Tom. He brings a strong understanding of the complex interactions between clients, employees, and the economic/business goals of AEC firms.

Tom holds a MBA from the University of North Carolina and a Bachelor of Science in Electrical Engineering from Duke University.

Phil **Keil**

SEE ALSO

Putting Clients First During a Recession: The Power of Client Experience in Strategic Planning

WED, May 10, 2023

BIG IDEA SESSIONS

12:45 pm – 1:30 pm

SELECT ONE

Building a Client Experience Culture

Beyond the Hype: Real Ways to Utilize AI in Your CX

Optimizing CX Through Client Assessments

BACK TO DAY 2 OVERVIEW

SESSION 1

Building a Client Experience Culture

Building a client experience culture is essential for companies that want to differentiate themselves from the competition and achieve long-term success. In this session, we'll explore the key strategies and initiatives needed to create a culture of exceptional client service, regardless of the size of your organization. Whether you work for a large corporation or a small business, you'll learn about the unique challenges and opportunities that come with building a client experience culture. We'll discuss the differences between large and small company programs and explore practical steps that you can take to overcome common obstacles.

Stephanie **Koeninger**

Stephanie is currently the Senior Vice President Client Experience at STV with over 20 years of experience. Prior to joining STV, she served as the executive director, growth and strategy at KPMG, where she led sales and marketing teams that managed enablement programs for account management, relationship management, sales effectiveness, lead management, opportunity management and voice of the client. Her extensive background includes program strategy, process design and execution, training design and facilitation, technology enablement, reporting/analytics, and adoption to support the overall client experience and strategic growth of the business.

Stephanie has Led domains for front office transformation and Salesforce implementation (including Qualtrics integration), managed teams for over 50 account managers, and developed and facilitated client service team training for hundreds of teams worldwide. She currently lives in Texas with her husband and two teenage sons.

WED, May 10, 2023

BIG IDEA SESSIONS

12:45 pm – 1:30 pm

SELECT ONE

Building a Client Experience Culture

Beyond the Hype: Real Ways to Utilize AI in Your CX

Optimizing CX Through Client Assessments

BACK TO DAY 2 OVERVIEW

SESSION 2

Beyond the Hype: Real Ways to Utilize AI in Your CX

We've all heard the buzz around ChatGPT, DALL-E, and other artificial implementations that are capturing the imagination of CX professionals and many others. Instead of focusing on the hype, this talk will cover four key areas where AI can be used in meaningful ways in any organization to improve the planning, design, delivery, and optimization of CX.

Greg **Kihlstrom**

Greg Kihlström is a best-selling author, speaker, and entrepreneur, currently an advisor and consultant to top companies on marketing technology, customer experience, and digital transformation initiatives as Principal and Chief Strategist at GK5A. He is also the host of The Agile Brand with Greg Kihlström podcast. He is a two-time CEO and Co-Founder, growing both companies organically and through acquisitions, and ultimately leading both to be acquired(one in 2017, and the other in 2021). He has worked with some of the world's top brands, including Adidas, ChoiceHotels, Coca-Cola, Dell, FedEx, HP, Marriott, MTV, Starbucks, Toyota, and VMware.

He earned his MBA from Quantic School of Business and Technology and is a member of the School of MarketingFaculty at the Association of National Advertisers. He currently serves on the University of Richmond's Customer Experience Advisory Board and the Workhouse Arts Foundation Board as Chair of the Marketing Committee. Greg was the founding Chair of the American Advertising Federation's National Innovation Committee and served on the Virginia Tech Pamplin College of Business Marketing Mentorship Advisory Board. Greg is Lean Six Sigma Black Belt certified, is an Agile Certified Coach (ICP-ACC), and holds a certification in Business Agility (ICP-BAF).

WED, May 10, 2023

BIG IDEA SESSIONS

12:45 pm – 1:30 pm

SELECT ONE

Building a Client Experience Culture

Beyond the Hype: Real Ways to Utilize AI in Your CX

Optimizing CX Through Client Assessments

BACK TO DAY 2 OVERVIEW

SESSION 3

Optimizing CX Through Client Assessments

For nearly two decades, Benesch has been effectively using client assessments to not only spot issues and improve experiences, but also to drive relationship expansion and grow revenue. In this session, we will discuss the process and outcomes of building out a formal client assessment program. We will cover the challenges of developing a consistent pipeline of clients to interview, securing attorney buy-in, and building a bench of quality assessors in-house. We will also discuss strategies to implement client feedback into business development efforts and to develop actionable insights at the client and firm levels.

SEE ALSO

Do You Aspire to Lead CX from the Executive Table?

Dan **Herbener**

Dan Herbener, Client Experience Analyst at Benesch, helped launch and currently leads the firm's client experience program. Since its launch, Dan has collaborated with departments across the firm to evaluate processes, identify technology needs, and collect and analyze client feedback and additional data points to ensure an optimal full-cycle experience for clients.

He currently manages or is heavily involved with the firm's new client onboarding, client assessment program, key client account program, and other various client experience initiatives. Dan earned his B.A. from Ohio State University and is currently pursuing his M.B.A. from Case Western University.

WED, May 10, 2023

GENERAL SESSION

1:30 pm – 2:00 pm

BACK TO DAY 2 OVERVIEW

CX and Sales: Leveraging Your CX Efforts/Programs During the Pitch Process to Attract More Clients, Win More Deals, and Accelerate Revenue

Incorporating your CX investments and hallmarks into the sales process involves using customer insights and feedback to create a more personalized, customer-centric approach to selling. By demonstrating your organization's commitment to creating a positive CX, you can build trust, differentiate yourself from competitors, and ultimately win more deals. The session will be highly practical and focused on providing attendees with actionable strategies for using CX to drive sales growth. As a result, attendees will likely come away from the session with a deeper understanding of leveraging CX initiatives during the sales process and a clear roadmap for implementing those strategies in their organizations.

SEE ALSO

Do the Work Today: Key Account Planning at the Enterprise and Individual Level for maximum ROI

Andrea **Mac**

Andrea Mac is an accomplished growth strategist known for being ambidextrous in the fusion of creativity and business acumen. She has a proven track record of generating revenue through Marketing, Sales, and Client Development Programs.

She founded Prequal to generate sustainable revenue opportunities for businesses through creative problem-solving to build new brands and business models, attract new audiences, secure sales opportunities with increased wins, and transform customer experiences.

She has a long career trajectory in the professional services field, and her work has been covered by Inc Magazine, Forbes, Crain's, MarketingProfs.com, The ABA Journal, The National Law Journal, and various industry publications. She welcomes new connections, so please reach out.

WED, May 10, 2023

GENERAL SESSION

2:15 pm – 3:15 pm

BACK TO DAY 2 OVERVIEW

Do You Aspire to Lead CX from the Executive Table?

Hear how four leaders are doing just that. During this panel, you'll hear from four peers at various stages of their CX career. From a seasoned CX professional to an emerging CX analyst, this group will share their stories of successes, failures, frustrations, and experiences. Hear how CX leadership interacts with other executive leaders, traverses long-entrenched organizational silos, and creates real, lasting change in their firms. Come prepared to ask your questions if you also aspire to one day be CXO at your organization!

Sidney **Abrams**

Relationship-driven at his core, Sidney Abrams has earned the reputation of trusted advisor to hundreds of nonprofit decision-makers, largely because of his passion for partnering with organizations to prioritize their people. In fact, throughout the entirety of his career, Sidney has focused on talent management, organizational development, and human resources, even in boom-and-bust economies.

From prospect stewardship to strategic alliances and charged with scaling growth, Sidney's role sits at the intersection of where organizations are going and the talent capacity needed to get them there. A collaborative thinker and leader with a can-do spirit, Sidney architects solutions for new and existing clients by mobilizing the best and brightest minds with cutting-edge people-focused solutions across all Nonprofit HR practices, including Strategy & Advisory, Outsourcing, Search, Total Rewards and Equity, Diversity, Inclusion & Justice.

Carl **Winstead**

Carl brings over 30 years of design and construction experience to the team. He has worked with a number of non-profit groups, government agencies, and university leadership on a variety of projects including housing, commercial, office, healthcare, and resorts throughout the US and internationally.

He is a skilled team leader, designer and facilitator with a passion for bringing people together in a collaborative environment to create design solutions that meet clients' budgets and schedules and provide innovative and effective solutions to fulfill their needs.

Mallory **Beaton**

Mallory Beaton, serving as the Director of Customer Experience at Power Design Inc, as well as a franchise owner at IMAGE Studios, is fascinated and enthusiastic about consumer behavior. With a history of working in project management, project finance, accounting, quality control, training, sales & behavior modification Mallory has developed a deep understanding of the internal dynamics that impact external perception.

She graduated from the University of Tampa with a bachelor's degree in accounting, providing her with a strong foundation in business and analytics. In 2014, Mallory designed and implemented Power Design's first voice of the customer program, which continues to evolve. In addition to client interviews, her team analyzes and communicates feedback, drives organizational initiatives and processes, executes custom events, and creates memorial moments.

Dan **Herbener**

SEE ALSO

Optimizing CX through Client Assessments

WED, May 10, 2023

BIG IDEA SESSION

3:30 pm – 4:00 pm

ATTEND BOTH

High-Octane Success: Maximizing Opportunities to Create an Extraordinary Client Event

Making Client Experience a “Hard Skill”

BACK TO DAY 2 OVERVIEW

SESSION 1

High-Octane Success: Maximizing Opportunities to Create an Extraordinary Client Event

In this session, we’ll review ways to make your client event extraordinary and impactful on multiple levels. When a large sporting event (Grand Prix race) was held right outside our office window, our firm took full advantage to create an exceptional experience for our clients. Every detail from concept to planning and to execution was covered. Employees from various departments who don’t usually work with big client events were all energized by the concept and became our Pit Crew. Everyone from our c-suite to our vice presidents to our project managers played a part in making it a valuable event for our firm and an unforgettable event for our clients. With approximately 250 people in attendance, it took a lot of coordination, managing, troubleshooting, and flexibility. But with its great success, it’s a much-anticipated event for our firm and clients. This session is a must-attend for anyone looking to rev up their client event planning strategy.

Joan **Hamrick**

Serving as the only client experience specialist for an architect, engineer, and design firm of over 1,100 employees in 25 different cities, for the past four years I have created this position from scratch and built it into a meaningful and necessary focus for our firm. With a background in working with college athletics marketing and promotions, I was familiar with building relationships with sponsors, ticket holders, and fans. I’ve translated these skills to a more technical and corporate clientele.

While the hours and lifestyles are not quite the same, both careers get to the core of relationships, providing touchpoints with the clients and creating a team of people to assist. A native Nashvillian, who gained much experience at large universities, I am proudly raising twin sons who have graduated from college and are pursuing their life’s callings. When not working, I enjoy hiking and traveling the US and Europe.

WED, May 10, 2023

BIG IDEA SESSION

3:30 pm – 4:00 pm

ATTEND BOTH

High-Octane Success: Maximizing Opportunities to Create an Extraordinary Client Event

Making Client Experience a "Hard Skill"

BACK TO DAY 2 OVERVIEW

SESSION 2

Making Client Experience a "Hard Skill"

A mid-sized engineering firm recognized the direct impact Project Management has on a client's experience outside of Operations. This firm took an empathetic approach to incorporating change across the organization with particular attention to the PM team. They started with a firm-wide reorganization and moved all things Project Management under the Client Experience leg of the firm, rather than the Operations leg. The result was an increase in engagement from Project Managers as well as Clients, which ultimately has further enculturated CX in all areas of their firm. This change has also helped PM's identify how the internal teams can minimize risk, minimize cost, maximize return, and increase focus on moments of delight for the client.

Desi **Podkowka**

Desi Podkowka is the Client Success Team Lead at Client Savvy, with responsibility in North America, Europe, and Canada. She helps to facilitate positive business outcomes for her clients through expert consultation and industry insights.

As a valuable member of the success team at Client Savvy, Desi brings a personable experience to the professional world. With over 8 years of industry engagement, she has a keen attention to detail and is known for maximizing CX excellence and delivering data-driven results.

Desi's background prior to Client Savvy includes project management, construction services, property management, and business development. In Annapolis, Maryland while working in real estate investment, she led teams through 6 multifamily property acquisitions and renovation projects. Desi's education is focused on business management and marketing and she is based at Client Savvy's headquarters in Raleigh, NC.

WED, May 10, 2023

GENERAL SESSION

4:00 pm – 4:30 pm

Helping Customers To Rationally Evaluate Risk

Customers face all kinds of risks in buying and using any product, whether B2B or B2C. Key factors in correctly evaluating such risks are awareness, understanding, quantification and clear articulation of the consequences. The benefit of successful communication is a dramatic increase in trust and delight with accompanying higher margins.   However, both Marketing and Legal are usually against clear transparancy in this area. Goodman will address how this problem is addressed in investments and insurance as well as by a BPO which is helping clients take innovative risks in going above the norm.

The session will end with the application of a set of evaluative cirteria to each participant's marketplace and highlighting thos with the apparent best and weakest scores, followed by group brainstorming for how to leverage or anhance best practices. There is a strong possiblility that Goodman will be accompanied by the CEO or COO of an investment advisor or insurance broker who will describe their approach.

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 led recently led the first rigorous study of customer delight https://bit.ly/3pgq0ZL   and assisted in the analysis of the 9th wave of the National Rage Study, completed in March 2020, on American consumers' complaining behavior. His books are CX 3.0 and Strategic Customer Service. He can be reached at jgoodman@ customercaremc.com and on LinkedIn.

BACK TO DAY 2 OVERVIEW

WED, May 10, 2023

CX GROUP OUTINGS

5:30 pm – 8:00 pm

BACK TO DAY 2 OVERVIEW

All is Fair in Cheese & Charcuterie

from shopping to serving, you'll go through all the steps of building a crowd-pleasing Cheeseperience!

Suggested mood music

The Charcuterie Song

Let's Wreck It!

Is work stressing you out? Is that person sitting next to you chewing too loudly getting under your skin? Is sitting in traffic making you lose your mind? Whatever is stressing you, we're going to help you smash it out by letting you loose in a rage room.

Suggested mood music

One Step Closer *or*

Here Comes the Hammer

Don't be Salty

Is raging not really your thing? Maybe it's time to detox and revitalize your mind and body. Be immersed within an artisan-crafted salt cave and receive the benefits of salt & sound therapy for a relaxing and unique experience.

Suggested mood music

Only Time

It's Not a Candle in the Wind

But it is a candlelight concert featuring some of Mozart's most popular compositions. Set in a historic chapel built in the 1800s, this event is sure to be one to remember.

Suggested mood music

Alla Turca Remix

Augmented Reality

Open a new kind of reality by diving into virtual reality.

Suggested mood music

Virtual Insanity

DAY 3

THU, May 11, 2023

8:00 am – 12:00 pm

Activities for the day include:

CXps
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8:00 am — **Breakfast**

Client Feedback Tool User Group Session | Networking Breakfast

with **Ryan Suydam**

Breakfast and/or Client Feedback Tool User Group Discussion

OPEN TO ALL

9:00 am — **General Session**

CX Outings - Workshops

After Wednesday evening's group outings, we'll reconvene to have round table discussions with your peers! 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.

12:00 pm — **Lunch & Conference Wrap-up**

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

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Conference Agenda

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