CX ps 2025

client feedback tool

CFT USER GROUP

AGENDA

Presented & Powered by ClientSavvy

June 11, 10 am – 4:00 pm

Bonus 'Meet the Experts Time'
from 4:00-5:00 pm

Level 3
Caribbean Ballroom 1-3

10:00 AM **GENERAL SESSION**

CFT: What's New, What's Coming, and WHY

Hear from our founder and CXO, Ryan Suydam, about Client Savvy's vision for the future of Client Feeback in professional services. Ryan will cover our focus on curating and acting on insights, the role of AI and analytics, and driving adoption to foster a listening culture across your organization.

Our Product Manager, UX Manager, and others from the Client Savvy team will demonstrate our latest capabilities, preview our product roadmap, and introduce the bold new ideas we're working on.

11:00 AM **BREAKOUT SESSIONS**

ROOM 1 Integrations and Tools

Firms getting the most out of client feedback integrate their client listening with their other tools, including CRM, ERP, and analytics platforms. In this session, hear from Client Savvy's industry partners, Techniks, Full Sail Partners, and Fast Slow Motion, as they share their integration solutions, customer success stories, and case studies. Roundtables will allow you to connect directly with the integrators for Q&A and ideas to help with your own integration strategies.

ROOM 2 CFT 101: Getting to Know the Tool

If you're not yet using the Client Feedback Tool (CFT) or are new to a company that does, this session is for you. The Client Savvy team will walk you through the foundations of our platform. In this session, we'll cover best practices for asking for feedback, alerting and acting on replies, the fundamentals of reporting, and the basics for administering a successful client listening program.

NOON **LUNCH**

1:15 PM **BREAKOUT SESSIONS**

ROOM 1 Advanced Reporting & Use Cases

Firms create tremendous value by listening to clients and responding to individual client feedback. However, the most successful firms go beyond asking and acting on individual feedback responses; CX leaders analyze trends, spot opportunities, and use feedback to inform business strategy.

During this session, the Client Savvy team will demonstrate several best practices for digging deep into client feedback data. You'll learn how to explore data so you can ask questions about it. We'll also demonstrate several common value-creators, such as identifying which clients are most likely to accept fee increases, how to identify growth markets, using feedback for go/no-go decisions, and more.

ROOM 2 Curating Insights from Feedback: Identify and Act

Have you ever been somewhere – a restaurant, hotel, event – that felt like it was designed just for you? Everything about it was tailor-made; it was delightful, and you left thinking, "I want to do that again!" The best brands carefully design customer experiences just for you to create that lasting memory. This emotional impact drives repeat business, referrals, growth – and all the other desirable business outcomes top brands achieve.

During this session, we will explore how brands build great experiences on the foundation of collecting, curating, and acting on client insights because they know they can't design for you if they don't understand you.

2:15 PM BREAK

2:30 PM BREAKOUT SESSIONS

ROOM 1 Accessing Data, BI, Etc.

We are diligently working to provide compelling, easy-to-use insights and reports within the Client Feedback Tool. But we've also heard demand for liberating CFT data and making it accessible in PowerBI, Excel, data warehouses, etc. During this session, we'll share best practices for accessing and working with CFT data outside the Client Feedback Tool.

ROOM 2 Tips, Tricks & Hacks | Stump Ryanne & Ryan

This open-ended session brings a collection of tips, tricks, and hacks to make managing client feedback easier. Ryan and Ryanne will share our personal "Top 10" tips list, and we invite each of you to bring your own hacks and tips to share with your peers.

We'll also have ample time for Q&A—bring your toughest questions and see if you can stump the experts. Our product leadership team will be present to hear your ideas and questions and incorporate your best ideas into the product roadmap.

3:30 PM REVIEW & WRAP-UP

We'll conclude the day by reconvening as a group to consolidate our insights. We'll reflect on key takeaways, discuss what has inspired and excited you the most, and identify any of your questions that remain unanswered. We want to ensure you leave feeling that your time attending our first-ever CFT User Group was a day well invested.

4:00 PM POST-EVENT MEET THE EXPERTS

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