



SPECIAL REPORT:

CUSTOMER INTENT

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SPECIAL REPORT: CUSTOMER INTENT



Competent organizations offer experiences that accommodate basic customer needs.

Elite, customer-centric organizations go one step further. They create experiences for their customers.

Not content to merely respond to direct customer requests, these organizations anticipate – and deliver – what their customers really want. They are not just providing support; they are empowering customers to derive the most possible value from every interaction, at every touch point.

There is a simple key to delivering this superior form of experience: understanding customer intent.



“Customer intent is the reason why a customer is in contact with a company,” explains Scott Horn of [24]7.ai.

Instead of focusing on the explicit – what the customer is requesting or where the customer is interacting – intent-driven organizations focus on the customer’s true goals for engaging.

The benefits of an intent-driven approach to engagement are substantial. Organizations will, however, face some key challenges in pursuit of those benefits.

This special report explores both.

It begins by revealing why knowledge of intent is so valuable to customer experience strategy. It subsequently illustrates how organizations can use knowledge of intent to identify – and seize – opportunities to elevate the customer journey.

Not content to simply share the theoretical value, the report reveals how to overcome barriers to adopting an intent-based model.

It closes by shining the spotlight on four particular industries – travel, banking, retail, and telecommunications – in which intent-oriented artificial intelligence technology can markedly improve the experience.

INTENT: MATTER OF CONTEXT

Customers have a clear objective when engaging with an organization.

They may be looking to make a purchase. They may seek an answer to a straightforward question. They may require help for a complex issue.

Whatever it is, this objective informs the specific expectations and demands for a customer experience. It explains the type of communication a customer hopes to receive, the specific outcome the customer hopes to attain, and the lens through which the customer will judge the experience.

It, quite simply, provides context for the interaction. This context is an utterly essential ingredient for creating a great experience.

When working to understand customer intent – and thus establish context for the interaction – organizations will want to answer some key questions.



How will the customer define success?

Organizations are increasingly recognizing that customers – not internal, operational metrics – determine the success of a customer experience.

By revealing what the customer is truly hoping to achieve, intent helps an organization identify the appropriate barometer for success.

The organization can ensure it is delivering an outcome the customer actually values rather than one that merely *seems* valuable.

What does the journey entail?

Customer interactions – even those of the transactional, low-touch variety – are not literally instantaneous.

They always involve a journey – a pathway between an origin (the initial point of contact) and a destination (the outcome the customer is seeking).

Knowledge of customer intent helps an organization understand the requisite journey. It can identify the touch points at which the customer will interact, the information the customer will need to provide, the questions the customer will likely ask, and the internal processes required to provide a solution.

How valuable (and risky) is the journey?

Certain customer journeys are more valuable than others. Some are more likely to result in a sales conversion. Others present a greater risk of customer frustration (and churn).

By zeroing in on the true reason the customer made contact, the organization can assess the potential value of the interaction.

What are the key “moments of truth”?

To deliver the best possible journey, the organization needs to understand the moments that most substantially impact its relationship with the customer.

When handled correctly, these “moments of truth” can drive customer satisfaction – and even produce upsell opportunities. When mishandled, they can cause customers to abandon the interaction – and even sever ties with the organization.

Which experiential factors are most important to the customer?

Thought leaders consistently remind businesses that factors like speed, effort level, and personalization all matter greatly to customers.

It is important to remember, however, that some factors are particularly important in certain situations.

Speed, as an example, represents a paramount concern for a customer looking to make a last-minute flight change. Effort may be the primary concern for a customer looking up a checking account balance, while personalization is especially important to a father planning a vacation for his wife and their special needs son.

By knowing *why* the customer is interacting, the organization can emphasize the factors that matter most at a given moment.



LEVERAGING INTENT

By working to understand customer intent, the organization gains context for each interaction.

Is that context actually valuable?

The answer is a resounding yes. Not simply a “nice to have,” context plays an essential role in optimizing the customer experience. It empowers the organization to reduce customer effort, increase satisfaction, trim costs and grow revenue. Every key stakeholder – from the customer, to the agent, to contact center leadership, to key executives – will receive a beneficial result.

To achieve these results, the organization will want to seize numerous opportunities made possible by an emphasis on customer intent.

Remedy pain points

By understanding why customers interact, the organization can determine the journey to which they will adhere.



“Start with defining each customer journey which is essentially based on business flow charts, meaning mapping out each possible touch point or interaction a customer can have with your company,” details Horn.

The organization can use that journey map to understand the specific *pain points* customers are likely to face. It can analyze (and eliminate) the greatest points of confusion or frustration, paying attention to when customers get mad, when they seek agent assistance, or when they abandon the conversation altogether.

Creating more valuable (and replicable) personalization

“Personalization” is not about superficial overtures like using a customer’s name in a sentence. It is not even about asking in-depth questions about the customer’s hopes and dreams. It is about delivering an experience that feels tailored to the customer’s immediate demands.

True personalization, it turns out, is more about the context of the issue than the individual caller.

By understanding why customers connect, organizations can deliver these substantively personalized experiences.



“If you call on the third of every month and always ask about your balance, we’ll start letting you know your balance when you first enter the IVR,” explains Terry Lang of Comerica Bank.

Not simply valuable for the customer, this form of personalization is also *scalable* for the business. The business can automatically deliver this experience to the *thousands* of customers who regularly ask about their balances. The experience will feel personal to these customers even though the business constructed them on a broad, macroscopic basis.

This does not, however, mean that customer profile data is totally irrelevant. Customer profile data can actually amplify the impact of intent-based engagement. With information about the motivations, relevant products and conversion drives for individual customer segments, the organization can operate with more confidence that it is delivering the right message, to the right customer, in the right channel, at the right time.

Predict customer behavior

With knowledge about how customers tend to pursue certain outcomes, the organization can anticipate their behavior throughout the journey. This allows them to more quickly and accurately direct customers to the appropriate channel or agent.

It also allows them to prevent future issues and interactions by preemptively sharing relevant recommendations or offers.

The customer benefits from an easier, more valuable experience; the contact center benefits from greater efficiency.



"We're now using data to proactively anticipate customer needs coming in," says Lang. "We're understanding what offers and messages are timely and relevant to our customers. We're doing this to enrich the relationship we have with customers."

Retool training, scripts and knowledge bases

Intent-driven engagement is about understanding the *real* reason behind a customer interaction.

In working to identify that driver, the organization will also discover the meaning behind certain comments, questions, and behaviors.

Using this knowledge, the organization can train its agents to identify subtle signals of customer sentiment. Agents will know how customers feel – even when those feelings are not expressed with words or dramatic shifts in tone – and adjust their own demeanor accordingly.

The organization can also align its scripts and knowledge bases with the phrasing customers actually use to ask their questions. Agents and self-service systems will be able to more quickly and accurately provide the guidance for which customers are looking.

Leverage proactive engagement

By reducing the effort associated with contacting a business, proactive engagement can be very valuable to customers.

It can also be a source of frustration. While customers appreciate relevant engagement, they do not want to be bombarded with unwanted marketing offers or unnecessary service information.

Knowledge of customer intent helps an organization ensure its outbound communication is productive. When organizations know what customers are trying to achieve, they can identify opportunities to proactively deliver those outcomes – when and where customers want them.



Incorporate – and optimize – automation

Customer journeys are not rigid constructs. Organizations can – and absolutely should – work to improve the process by which a customer attains a particular outcome.

By elevating self-service, automation provides customers with the desired improvement.



"There are two types of queries in my opinion: a request for information and a request for service," says Ronnie Haim of Groupon. "What we see is that the request for information is those which are preferred to be self-service by our customer."



"Delivery tracking is a classic example of how customers would love to self-serve," adds Ranjith Boyanapalli of Flipkart. "Ditto for creating a return or canceling their orders. Moving to 100% self-service is a strong focus in these cases, [leading to a scenario] wherein the customer contacts an agent only in the case of requests or complaints and not for any queries and basic actions."

An automated prompt can answer basic questions (such as information regarding return policies, minimum payments, flight change fees or service upgrade costs) without requiring the customer to converse, let alone wait for an agent.

A chatbot can offer enhanced, conversational support for customers that need a higher degree of assistance yet want to enjoy the convenience of a digital, text-based interaction.

By identifying the best “match” between the customer, the issue, and the internal employee, automation can even optimize journeys that *do* require agent assistance.



“We’re using data from the speech side to allow customers to connect in a natural language and [reveal] their intent,” shares Lang. “[With that information], we can route them directly to the right live agent.”



“Artificial intelligence and machine learning provide customer self-service, maintain the context of the conversation across channels, and understand what the customer is talking about to deliver the best possible experience, enabling customer success without requiring extra customer effort,” adds Horn. “For example, when a new customer’s objective is to change their password, the AI can draw upon its past experiences in solving the same query to make the experience more fluid and easy for the new customer.”

Build (and protect) customer relationships

By helping to reveal the stakes associated with particular journeys, intent also helps organizations improve and preserve customer relationships.

If a particular journey tends to produce upsell or renewal opportunities, the organization can steer the customer to an employee with sales skills. If, on the other hand, the journey tends to result in frustration or cancellation, the organization can allow for seamless escalation to a more empathetic, retention-minded agent.

AI solutions can contribute immensely to this effort.



“AI enables companies to classify and predict where a customer is on their journey, what they’re trying to accomplish and what they’re propensity is,” says Horn. “This allows you to target (and retarget), as well as determine how much you bid for them, what message to deliver and when to engage them via virtual agent (chatbot) or digital chat agents (live person).”

CREATING AN INTENT-DRIVEN EXPERIENCE

At its core, intent-based engagement is an exercise in better understanding customers and the way in which they connect.

That understanding, obviously, hinges on data. If an organization cannot collect, process, and leverage accurate, actionable data about its customers, it cannot determine their intentions when interacting. It most certainly cannot make any of the aforementioned improvements to its customer experience.

To create a framework for intent-based engagement, an organization will need to address two widespread data challenges. After correcting those issues, it can employ key technologies and strategic best practices to make intent the core driver of its customer experience strategy.



Challenge: Disconnected Channels

Customers – and their interactions – span multiple channels.

These channels are not always connected. In the perfect illustration of that reality, 55% of organizations reveal that their customers *must* repeat information when moving to a new channel.

If customers and data do not flow freely between channels, the organization will be left with a fragmented view of the key customer journey. It will know what happened within each disparate channel, but it will not have a true sense of the pathway from problem to resolution.



Customer experience optimization is “not about the point solution but the connected journey and how everything works together,” shares Horn. “Companies need to address their customers’ overall customer experience instead of [that within] one channel.”





Challenge: Disconnected Organizations

Interactions do not simply span channels; they may also require various different systems and the involvement of numerous employees and departments.

If these systems and functions are not integrated, the organization will be unable to identify connections between the data. It will be unable to sufficiently map the operational processes associated with a particular issue and thus incapable of anticipating optimizing future conversations.

By eliminating those points of fragmentation, the organization will improve the flow of data. It will ensure it is gaining all relevant knowledge about customers, why they are interacting, and what it takes to solve their problems.



Action Plan: Building Models

Data alone does not empower an organization to deliver intent-based engagement.

The organization must also understand the narrative behind the data. It must understand how the data comes together and what it says about the key moments, challenges and opportunities associated with the various customer journeys.

It needs to leverage *models*.

By identifying patterns from across a sea of interactions, these models provide the intelligence required for intent-driven engagement: why the customers connect and what happens when they attempt to achieve those objectives.



“The intent models can then be applied to every technology involved in the customer experience, from chatbots to empowering live agents,” says Horn.

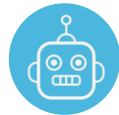
After connecting its touch points and establishing the requisite data framework, the organization can embark on two specific steps to build and refine its models of intent.



Leverage Preexisting Industry Models

Millions of customer interactions take place each day. While these interactions may involve different customers and different specific language, many are united by similar “intent.”

By analyzing millions (if not billions) of interactions within different industries, leading organizations have been able to develop models for custom customer experience journeys. Organizations can use these pre-built models to power their bots, train their agents and wow their customers.



Employ Artificial Intelligence

The customer contact landscape is constantly evolving.

New technologies and channel options frequently emerge, and specific customer demands often change.

This ongoing transformation can affect the accuracy and relevance of particular intent models. As customers develop new reasons for engaging or demonstrate new behaviors during the engagement process, the old models will no longer be as relevant.

Artificial intelligence is the key to adjusting these models. By processing data from the point of contact (or from backend systems), AI technology can spot changes in customer motivations and journeys.



“By combining language data with huge volumes of behavioral and transactional signals, AI models can more accurately determine a consumer’s current journey and anticipate the next step in that journey,” says Horn. “The more access AI has to data, the more it learns about customer intent and offers the correct solution.”

AI technology, of course, plays a dual role when it comes to intent-driven engagement. In addition to helping organizations model intent, it helps organizations act on those models. Chatbots, as an example, can be leveraged to provide resolutions, simplify experiences and ultimately provide more value at the crucial “moments of truth.”



Action Plan: Additional Best Practices

Once the organization commits to intent-driven engagement and develops models for acquiring the relevant contextual information, it has the *potential* to create more valuable customer journeys. It will still need to take a series of other measures to turn the possibility of intent-based interactions into a reality. Here details those key best practices:

1. **Embrace the digital transformation.** Digital environments, including agent-assisted channels and self-service platforms, often represent the channel of choice for customers. They, moreover, often represent the most efficient, effective way to deliver the resolution customers really want.
2. **Be methodical.** Instead of attempting to change all channels, interactions and departments over night, start with a small segment of the business. Test the initiative, gather necessary data, and use that insight when slowly expanding the measure into other units.
3. **Identify the most valuable customer journey** – and the associated customer intent.
4. **Analyze this high-value journey**, paying particular attention to pain points.
5. **Rethink the journey map**, particularly as it relates to using digital channels in a more intuitive, valuable manner.
6. **Use intent-driven AI technology** to automate and further enhance the journeys.
7. **Measure, analyze and optimize the journey**, then move onto new ones.



INDUSTRY SPOTLIGHT



As a concept, intent-driven engagement is undeniably valuable. By empowering the organization to identify, predict and meaningfully satiate customers' true needs, the approach philosophically befits the idea of customer centricity.

The customer experience is not, however, a game of great ideas and smooth talk. It is an endeavor predicated on action and governed by meaningful results. No matter how theoretically useful, customer experience initiatives must create considerable value for customers and drive significant improvements for the business.

If not, they represent admirable pursuits rather than strategic imperatives.

Intent-driven engagement falls into the latter camp. Not simply a promising idea, it proves transformative in practice.

To illustrate the real-world advantages, we explored examples of common journeys in the travel, telecommunications, financial and retail sectors. In each case, we reveal the customer's objective, the information and actions needed to deliver that outcome, and the impact of an intent-based approach.

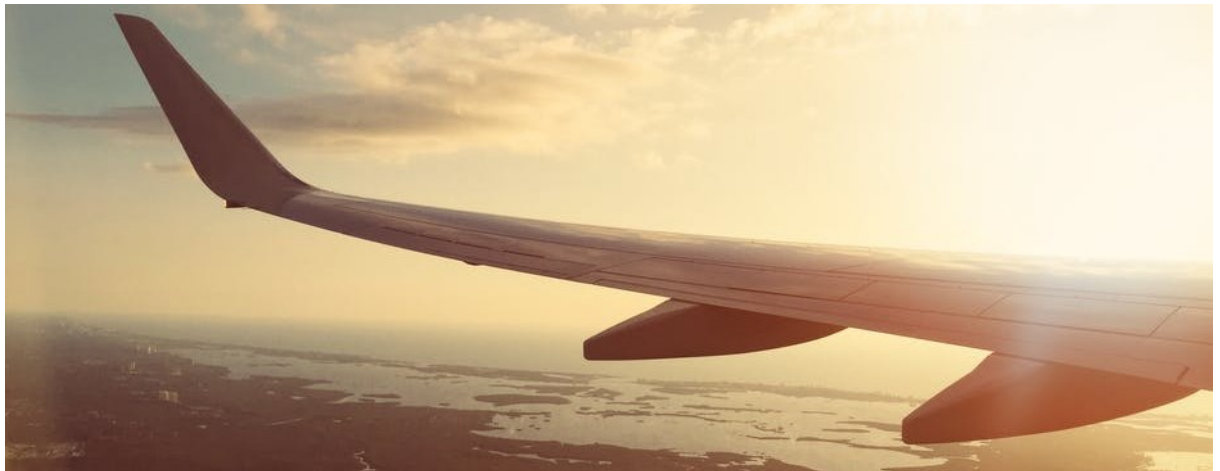
Travel



Travel is ultimately a gateway to a particular experience. Customers rely on travel services to get to a meeting on time, secure lodging while attending an out-of-town wedding or give themselves a vacation from work.

Insofar as travel is a “vessel,” customers obviously resent difficult, intensive booking experiences. They crave convenient interactions that allow them to easily handle logistics – and focus on getting to (and enjoying) their destination.

Intent-driven AI technology helps businesses meet this customer demand. It quickly identifies why they are calling, collects the necessary information, and quickly executes the transaction.



Example Customer Intention: Change a flight reservation

Essential Information

- Customer’s account and profile information
- Customer’s flight reservation number
- Alternative options for getting to the destination
- Explanation of change fee
- Payment information and processing for change fee

Intent-Driven Journey

A customer requests a flight change using the company's AI-driven messaging solution. After authenticating the customer, the bot locates the reservation and confirms that the customer is looking to "change Flight 215, LAX to JFK, which is scheduled to depart at 2:15PM."

Upon receiving the confirmation, the bot reveals "alternative flights at 3:35PM, 4:15PM and 5:30PM." It lists the fee associated with each alternative.

When the customer selects a flight, the bot redirects the customer to a secure payment page. After making the payment, the customer is routed to a portal for selecting flight options and checking in.

Not exclusive to the flight experience, intent-driven AI can also assist with all facets of the hotel booking journey.



"[24]7.ai helps us anticipate what our guests want and ensure they receive the guidance that's right for them, at the right time in their journey," says Mike Gathright of Hilton.

Telecom



All utility companies produce a duality of issues for customers: account management challenges and service delivery challenges.

The stakes of these issues are especially significant for telecommunication providers, which do not necessarily benefit from monopolies. They often are at risk of losing customers with poor experiences. Indeed, increasing customer satisfaction and reducing customer attrition represent top priorities for businesses.

To meet those goals, telecom organizations must quickly spot – and adapt to – customer intent. They must ensure that every moment paints a positive picture of the brand, the value of its services, and its commitment to the customer's happiness.

Sharing incorrect information, asking the customer to endure a cumbersome support process, or pitching (if not sneakily selling) unwanted services break this vow.

Intent-driven AI helps organizations avoid those pitfalls.



Example Customer Intention: Save money by switching to an unlimited plan

Essential Information

- Customer's account and profile information
- Existing usage
- Cost associated with the upgrade
- Other functionality of potential value for the account
- Payment information
- New service announcements

Intent-Driven Journey

The customer calls the support line; the IVR instantly authenticates the individual using the phone number on record.

Upon pulling up the customer's name, the IVR offers the customer the opportunity to explore account information. It also presents relevant upgrade opportunities—flagged by intention (save money, add services, improve functionality, etc).

At the onset of the conversation, the agent already knows the customer is looking to make an account upgrade. With access to the customer's existing account and an existing pricing guide, the agent can help the customer understand the impact on the bill.

As the agent understands the customer's goal, they can also make other relevant offers. If a customer is switching to an unlimited plan to save money, as an example, the agent can recommend "committing to a two-year contract" to save \$10/month.

Once a decision is made regarding the offers, the agent can process the customer's payment, provide a confirmation number, and close by sharing any service announcements of relevance to the customer's account. The agent can also invite the customer to opt into alerts about future deals and discounts.

Banking & Finance



Banking is the ultimate actualization of the "have your cake and eat it too" principle.

Due to the high stakes of the service, customers demand accuracy, consistency, empathy and value from each interaction. Every "moment of truth" must give the customer a reason to trust the business.

Customers still expect these interactions to be quick, seamless and befitting the digital world. They may be demanding high value from each interaction, but they are not willing to tolerate slow, unproductive, complicated phone conversations.

To meet this demand, organizations must deliver experiences that are cognizant of emotion and intention. They must strive to quickly deliver exactly what the customer is trying to achieve, while instantly adapting in the event the journey hurts sentiment.

They must leverage intent-based AI.



Example Customer Intention: Make a minimum monthly payment for a credit card bill

Essential Information

- Customer's account and profile information
- Authentication questions or tokens
- Existing account balance
- Amount of minimum monthly payment
- Other payment options
- Payment details
- Posting date
- Other outstanding account issues

Intent-Driven Journey

Based on confirmed preference that the customer would rather receive mobile alerts than emails, a chatbots proactively lets a customer know that their minimum monthly payment of \$140 is due on March 15.

The note gives the customer the option to pay that amount, get balance details or instantly transfer to a live agent.

If the customer selects the first option, they are transferred to a secure payment portal. If they inquire about balance details, they are subsequently prompted with options for making other payments (such as the total amount due). If they ask for the live agent, the agent already has the account open and can provide detailed information (after verifying identity with a simple knowledge-based authentication question).

As the customer finalizes the payment, the web tool (or live agent) provides a confirmation number, the posting date, and the new credit limit/account balance. The touch point also alerts the customer to any other missing account information, while offering the opportunity to sign-up for automated monthly payments.

Retail

Great offers may bring customers and retailers together. Great experiences keep them together.

Insofar as competitors ultimately can (and will) offer similar products at similar price points, experiential factors represent the key to demonstrating differentiation and building customer loyalty.

“Seamless personalization” is often the key to achieving those goals. If organizations can anticipate and meet specific customer needs in a convenient, low-impact fashion, they establish themselves as brands with which customers want to connect.

Intent-driven AI helps retailers establish this customer-centric brand identity. It, more importantly, helps the organization identify and maximize opportunities for driving future purchases.



Example Customer Intention: Returning a product

Essential Information

- Customer's account and profile information
- Details on the specific purchase
- Details on the defect
- Customer's request (refund, exchange, store credit)
- Return policy, including any restock and shipping fees
- Alternatives to the return
- Shipping instructions (if relevant)
- Payment information (for refunds)

Intent-Driven Journey

An e-commerce customer logs into their account and searches “returning a product” on the FAQ page.

Recognizing the likely goal, an automated chat window pops up, asking the customer to confirm their interest in making a return.

With the interest confirmed, the bot asks if the return is related to one of the three most recent purchases. Where relevant, it also asks the customer to identify the reason for the return (defective, does not fit, better price elsewhere, etc).

Once the system identifies the product the customer wishes to return, it shares the associated return policy (and any associated fees). It also provides customers with alternatives to the return (if the return is based on price, it invites the customer to use price matching; if it is based on a product defect, it offers instant escalation to a technical expert).

Assuming those alternatives do not work, the bot directs the customer to a form for processing the return – and securing the necessary shipping items. It also provides confirmation of the refund.

Puzzle by Alex Auda Samora from the Noun Project; bright by Creative Stall from the Noun Project; tools by Ralf Schmitzer from the Noun Project; Robot by Maxim Kulikov from the Noun Project; Plane by Stefan Mihaylov from the Noun Project; customer service by Rudy Jaspers from the Noun Project; finance by nawaf falah from the Noun Project; cart by Alfa Design from the Noun Project

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#CCWDIGITAL

Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital's series of reports. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

2018 Special Reports Calendar

Special Reports Calendar is subject to change.
Updated as of 3/15/18

Publish Date	Report Topic	Sponsorship Deadline
Jan. 2	2018 Predictions	Dec. 15, 2017 SOLD
Jan. 16	Retail CX	Dec. 20, 2017 SOLD
Feb. 1	Omnichannel	Jan. 18, 2018 SOLD
Feb. 15	Messaging	Feb. 1, 2018 SOLD
Mar. 1	CX Automation	Feb. 15, 2018 SOLD
Mar. 15	Customer Intent	Mar. 1, 2018 SOLD
Apr. 2	Brand Reputation	Mar. 16, 2018 SOLD
Apr. 16	Outsourcing	Mar. 30, 2018
May 1	Luxury	Apr. 13, 2018
May 15	Agent Performance	Apr. 27, 2018
Jun. 1	Customer Journeys	May 18, 2018
Jun. 15	Self-Service	Jun. 1, 2018
Jul. 1	FP3 Experience	Jun. 15, 2018
Jul. 15	Outbound & Proactive Engagement	Jul. 2, 2018

2018 Special Reports Calendar

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Updated as of 3/15/18

Publish Date	Report Topic	Sponsorship Deadline
Aug. 1	Actionable Analytics	Jul. 19, 2018
Aug. 15	Customer Complaints	Aug. 1, 2018
Sep. 4	Chatbots	Aug. 21, 2018
Sep. 17	eCommerce & the Digital CX	Sep. 3, 2018
Oct. 1	Learning & Development	Sep. 18, 2018
Oct. 15	Remote Agents	Oct. 2, 2018
Nov. 1	Future Workspaces	Oct. 18, 2018
Nov. 15	Knowledge Management	Nov. 2, 2018
Dec. 3	Live Chat	Nov. 16, 2018
Dec. 17	CX Automation Pt. 2	Dec. 3, 2018

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Chief Customer Officer Exchange

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www.chiefcustomerofficerexchange.iqpc.com



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The Mirage, Las Vegas, NV

www.customercontactweek.com



Chief Experience Officer Exchange

July 29-31, 2018

Chicago, IL

www.chiefexperienceofficerexchange.iqpc.com



CX Week Canada

September 12-14, 2018

Toronto, ON, Canada

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