

Chief Customer Officer Forum

The Shangri-La Hotel,
Sydney
15 - 16 May 2019




Chief Customer Officer Forum

Options in Connecting with Customers and
Employees



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Welcome from the CCO Forum Committee



The theme for today's Forum is, **Options in Connecting with Customers and Employees**, and we're delighted with the range of speakers and topics that have come together.

Our Opening Keynote speaker is **Holly Kramer**, a former CEO and board member across a range of diverse industries, who started life as a marketer. Holly is well qualified to discuss "How we connect (or not) with customers at different levels of the organisation". Closing speaker **Ben Crowe** - Global Expert in Connection and Story Telling, will give us a very different perspective on connecting, as his expertise is more at the individual and team level. We are looking forward to hearing from one of Australia's leadership experts.



Our third guest and visiting Academic for the day is, **Dr Robert Kay**, Adjunct Professor at Macquarie University. Robert will be chairing discussion groups through the day, on his research into why innovation often fails in organisations. He has some very interesting ideas to share.



We have a great mix of speakers from outside the membership and within. As we wanted to understand why applications do and don't connect, we invited **Gerry Gaffney** who is a UX expert, to discuss UX and usability. **Nicola Lambie**, CUA, will give an example of an app in members hands and share how this lets members choose and work with their banker in new ways that create personal connections. **Julie Armstrong**, will explore how uno, has rethought their customer value proposition to overcome the trust deficit left after the Royal Commission. **Jo Devery**, Winning Group, will share more detail of their customer obsessed business that connects with very different segments through different offers.



Three cases focus more on connecting with staff. **Rochelle Stokes** of Hyatt Hotels Corporation will share how they stay connected to staff despite a mature home working model. **Steve Hoffman**, Bunnings, will discuss engaging staff at scale across Australasia. Our CCOF member, **Deanne Martin**, SEEK, will share learnings on engaging a largely millennial workforce and working with the business on customer improvements.

Please also join us in welcoming our new members and guests. We look forward to an interactive and informative day and as always welcome your suggestions on discussions for the future, possible speakers and new members.



The CCOF Member Committee

Julie Starley, Andrew Kiel, Lisa Pogonoski, Samantha Bartlett, Matt Paterson and David Jaffe

Agenda

Wednesday 15 May 2019

6:00pm – 7:00pm Arrival drinks at The Bentley Restaurant and Bar Room

7:00pm – 10:00pm Dinner at The Bentley Restaurant and Bar

Thursday 16 May 2019

The Shangri-La-Hotel, Cumberland Street, Sydney

8:00am Registration and Coffee

8:30am Welcome and Introductions

8:45am Opening Keynote: Former CEO, Best & Less, Board
Member across a range of diverse industries

9:45am Coffee Recharge

10:00am Break Out Session 1

11:15am Morning Tea Break

11:45am Break Out Session 2

1:00pm Lunch

2:00pm Break Out Session 3

3:15pm Afternoon Tea Break

3:45pm Closing Keynote: Ben Crowe, Global Expert in Connection
and Story Telling

4:45pm Closing Questions and Wrap Up

5:00pm Meeting Close and Drinks at the Bar, The Shangri-La Hotel,
Sydney

Opening Keynote

Holly Kramer, The Journey from Marketer to NED: How we connect (or not) with Customers at different levels of the organisation

Holly Kramer started her career in a broad range of marketing roles and brings that perspective to connecting with customers. In this talk, she will reflect on the customer connection strategies she used as CMO at Telstra and in her turnaround role as CEO at retailer Best & Less. With current and past board roles at companies such as Woolworths, Australia Post, AMP and Nine, she will discuss what customer related information reaches board level and possible strategies to better connect boards with their customers now and into the future. She'll also compare and contrast the ways customers and customer issues are regarded across different industries. This should be a fascinating presentation from one of Australia's business leaders.


Breakout Sessions

Dr Robert Kay, Executive Director & Co-founder, Incept Labs: Strategic and Organisational Secrets to Unlock Innovation

Have you ever felt that your organisation is better at finding reasons not to do things or not to risk growth? You may not be alone. Dr Kay has been researching what makes innovation work for many years and has identified some key obstacles that most businesses have and structural and process blockages that most companies create (and uses the phrase innovation constipation to describe this). In this interactive workshop he will share this research and help all participants understand their organisation better. In doing so he'll give you ideas and strategies for overcoming obstacles to innovation and help you communicate customer related opportunities and strategies more effectively. This should be among the most interesting strategic discussions we have had at the CCO Forum and Dr Kay is our visiting academic for the day.

Deanne Martin, Head of Customer Service, SEEK: Strategies to Unlock the Potential of the Millennial Workforce

Deanne Martin took over SEEK's Customer service function to find it in its' traditional place at the bottom of the food chain. In this case she'll describe a range of mechanisms she has established that has had amazing results in engaging a largely millennial workforce and at the same time engaging the business in customer improvements. The tools and tricks include providing executive access to real time access to customer chat and hackathons engaging front line staff in whole of business problems. Deanne has also proven the case for forward recruitment, uses staff to hire and induct their colleagues and uses blended cross channel work and work from home to create an engaging



workplace. This case study will be full of ideas with proven results that you can take to any business.

**Rochelle Stokes, Director Operations Design, Hyatt:
Hyatt's Lessons in evolving agents from Home globally**

Fifteen years ago, Hyatt's main U.S. Contact Centre was full, so by necessity they started home-working. The model has been through many iterations and is now a fundamental to the way Hyatt thinks about working with staff and looks to engage with different potential parts of the workforce. Rochelle will share how the model has evolved and what adaptations were necessary for Australia. She'll also describe the different elements that have been tried and what worked and didn't to engage staff with their business. Rochelle will also compare and contrast with the outsourcers they use. This case will cover one of the most mature businesses in home working globally.

**Julie Armstrong, Chief Operating Officer, uno
Breaking the Broken Broking Business Model at uno**

The Banking Royal Commission has identified many issues with Mortgage Brokers. Fintech uno is one of two major new emerging digital brokers that plan to fill the trust gap that poor broker behaviour has created. Julie will describe how uno has rethought their customer value proposition to form more valued customer connections, in ways that start-ups have to do. She'll describe what has changed and lessons from their previous iterations and how digital brokers can offset the negative perceptions and issues that have been well documented. This will be an interesting case in how re-intermediation and disruption can work hand in hand.

**Gerry Gaffney, Information & Design,
Lessons in Success and Failure in connecting with Staff and
Customers through UX design**

Gerry Gaffney is one of Australia's foremost experts in UX design and has been helping organisations get it right for over twenty years. He will share a variety of cases in this session spanning the public and private sector and talk about the common UX themes and processes needed for customers in any industry. He'll share lessons such as the importance of non-technical prototypes in design and why designers can never second guess customer or user behaviour. The cases will showcase lessons from successful applications but also describe the lessons from those that haven't worked well. He'll cover what customer thinking is needed to create effective interactions across all forms of self service from web sites to IVRs and apps.

Jo Devery, Group Chief Operating Officer, Winning Group Winning Retail Formula - Building a Culture of Customer Obsession

The businesses of the Winning Group have grown dramatically in the last decade and they are opening stores while others go under. Hear how the customer obsession pervades all five businesses in the Group and all 700 people who work there. Jo Devery will describe how the customer experience of bricks and mortar stores two store types and their online business, has been tailored to the needs of those customers to provide award winning interactions. She'll also share how customer measurement pervades the business and the tools and tricks that Winning use to create a customer obsessed business.

Nicola Lambie, Head of Sales Transformation Personalising Personal Banking - the iM CUA story

Hear how Australia's largest credit union, CUA, has delivered an Australian first mobile app that allows members to choose their own personal banker, allowing members to chat to the same person every time and build a personal connection. The game changing iM CUA initiative brings together personalised service and the convenience of technology to deliver digital banking with a human touch. In this session, CUA Head of Sales Transformation Nicola Lambie will explain how the channel has linked in with service through other existing channels like branches and the learnings about member preferences to use the app for both sales and service. The app is an example of how collaboration with international peers and technology partners has allowed the credit union to be the first to market with a concept that rewrites the digital banking playbook, positioning digital as a channel for human connection, rather than a channel that removes people from the interaction.

Steve Hoffman, Customer Experience Lead, Bunnings Group Limited Delivering Better Customer Experience through improved Team Experience.

Bunnings growth and success is well documented in the Australian market and the business has been the growth jewel in the Wesfarmers crown. With over 300 stores across Australia and New Zealand one of Steve's challenges is keeping staff engaged and aligned. Steve will describe how Bunnings has achieved far lower rates of staff attrition than other retailers. They have also faced up to new challenges such as; an informational imbalance between customers and staff, as customers become more knowledgeable and informed through digital sources. Steve will describe techniques they have used to inform and engage staff and lessons they have learnt in types and frequency of staff engagement. He'll also describe some innovative techniques that they are trialling.

Closing Session

Ben Crowe, The Connection Perspective

As a renowned expert in developing **Connection**, Ben will take the audience on an inspiring and unexpected journey to discover the quirky and counter intuitive principles behind successful teams and leaders.

With an emphasis on **Service**, Ben explains how three inter-related mindsets (purpose mindset, connection mindset and performance mindset) can create the most extraordinary competitive advantage and point of difference for organisations. The talk will also explain the power of vulnerability and storytelling, using personal case studies from Ben's work with some of the world's most famous individuals and organisations.

Guest Speaker Biographies

Holly Kramer, former CEO of Best & Less and Board Member across a range of diverse industries

Holly is a Non-Executive Director on the Boards of Woolworths, Australia Post and 2XU and former Board Member of AMP Ltd. She also serves on the Boards of the GO Foundation and regional community-owned telco, Southern Phones. A member of Chief Executive Women (CEW) and an Ambassador for the Vinnies CEO Sleepout, Holly also sits on the Finance and Investment Committee for Western Sydney University. In her executive career, Holly was the CEO of apparel retailer Best & Less, where she was responsible for transforming the business and returning it to growth and profitability. In that role, she was responsible for approximately 200 stores and 4300 employees across Australia. Prior to Best & Less, she was an executive at Pacific Brands, running the Workwear and Homewares Divisions, and Telstra, where she held the roles of Group Managing Director- Product Management and Chief of Marketing. Holly has also held senior roles at ecorp Ltd (a PBL company) and a variety of marketing roles at Ford Motor Company in Australia and in the U.S., Holly has a BA with Honours in Economics and Political Science from Yale University and an MBA from Georgetown University.



Holly Kramer

Ben Crowe, Global Expert in Connection and Story Telling

In a world crying out for purpose, connection, confidence and perspective, Ben Crowe is arguably one of the most important and inspiring speakers of our time. As NIKE's former International Director of Sports Marketing, Ben worked with some of the world's most famous individuals, including Andre Agassi, Michael Jordan and NIKE CEO Phil Knight.

Currently as a leadership mentor, life coach and adviser, Ben works closely with business leaders, Federal Governments, coaches and athletes across the



Ben Crowe

globe explaining how authenticity, vulnerability and storytelling can create an amazing culture and competitive advantage – plus, generate a life that balances achievement with fulfilment.

As a renowned expert in developing **Connection**, Ben takes the audience on an inspiring and unexpected journey to discover the quirky and counter intuitive principles behind successful teams and leaders

Unpacking:

- purpose
- connection and
- performance mindsets.

Ben explains the power of **Purpose** using personal stories from numerous organisations and high performing sports people. How professional Tennis player and crowd favourite Roger Federer's counter intuitive focus on gratitude, humility and humour enabled him to become the No. 1 tennis player in the world.

Using story to highlight the principles of **Connection** mindset, Ben explains how to embrace vulnerability, imperfection and self-worth, and challenges the audience deeply about their own perspectives towards themes such as:

- Expectation vs Appreciation
- Resume virtues vs Eulogy virtues
- Extrinsic motivation vs Intrinsic motivation
- Achievement vs Fulfilment
- I vs WE
- person vs persona

Finally, Ben explains the principles behind developing a high-performance mindset inside organisations, explaining how to focus attention to avoid the distractions which typically sabotage performance.

Ben has worked closely with business leaders across the globe, including Toyota, Facebook, Ernst & Young, Telstra, Lexus, NIKE, and almost every sports organisation in Australia and overseas.



Dr Robert Kay

Dr Robert Kay, Executive Director & Co-founder, Incept Labs and an Adjunct Professor at Macquarie University

Robert Kay is Australia's most sought-after keynote speaker on governance and innovation. He is also a renowned social researcher having interviewed hundreds of CEOs and Directors from Australia's leading corporates. With a career that has continuously moved between industry and academia, Robert's perspective is based on a rare mix of practical experience and rigorous academic research. Robert believes, that understanding what makes organisations tick is not something you can achieve through a simple survey. You need to get inside the minds of its decision makers to identify the patterns

of behaviour that make a difference. His keynotes distil his observations into clear messages that he communicates through the innovative use of video and emotion charged stories. You don't forget the lessons you learn through stories and you won't forget Robert's presentations either. Furthermore, his presentations provide the audience with a simple yet powerful language to talk about the complex challenges of governance and innovation.

Robert's presentations have changed the way leadership teams look at themselves, their organisations, and innovation in general providing ongoing value long after the event. Current work Executive Director of globally recognized think tank - Incept Labs, and an Adjunct Professor at Macquarie University.

Previous experience Positions:

He was formerly the Head of Strategic Innovation at Westpac Banking Corporation; a Senior Lecturer in Information Systems and Organisational Development at UTS, and a Research Analyst for Bovis Lend Lease.

Study: Over the last 5 years he has been commissioned to undertake multiple studies of senior leaders, covering issues as wide ranging as organizational resilience, the relationship between governance and performance and a world-first comparison between public and private sector approaches to innovation. In combination these studies have led to powerful insights about how organisations can deal with disruption, the role of trust, and approaches to change that lead you to question the way you think about organisations.

Deanne Martin, Head of Customer Service, SEEK

A dynamic passionate senior leader with over 15 years' experience in senior roles in Telco, Manufacturing and Online Media. Recognised as a thought leader I have a proven track record of adapting my leadership style across a multiple of functions displaying strengths in strategic, operational management and transformational projects for Customer Service, Retention and Sales environments.

Well-developed leadership and relationship building talents are complimented with sound project management skills and financial management experience. Experience in designing and implementing Customer Service Retention Strategies and leading major transformation projects. Recognised as a business leader who enjoys inspiring others to greater performance by building confidence through mentoring, coaching and training.

Specialties: Designing and implementing differentiated service and customer relationship management strategies that deliver cost reduction whilst leading in delivery of innovative excellent customer experience.

Change management: Start up environments, new initiatives and transforming low performance cultures to productive and high performing in both sales and service results.



Deanne Martin



Steve Hoffman

Steve Hoffman, Customer Experience Lead, Bunnings Group Limited

Throughout his career Steve has maintained a sharp focus on the customer. He has experience in store operations, range buying and store development within some of Australia’s best-known brands including Myer and Bunnings and more recently he has overseen growth and expansion in his own successful business.

From leading large teams to coaching franchisees, Steve has always looked from the customer perspective in driving towards best practice. Recently returning to Bunnings as Customer Advocacy Manager and now as Customer Experience Lead, his challenge is to help the organisation navigate through their next phase of growth.



Rochelle Stokes

Rochelle Stokes, Operations Design - Director, Global Hyatt Corporation

A dynamic entrepreneur who utilises creativity, leadership and teamwork to design and execute solutions that create customer value and staff engagement. Known for social intelligence as an effective communicator with an authentic approach towards motivating others and driving excellence.



Julie Armstrong

Julie Armstrong, Chief Operating Officer, uno

I am a very driven and motivated leader with over 20 years’ experience in Financial Services and Banking. I have extensive experience in leading and developing high performing teams across multi-disciplinary functions including operations, sales and risk.

I am passionate about developing and delivering outstanding customer experiences.

I have a proven track record in leading start up organisations and I have been instrumental in growing them into successful, thriving and mature businesses.



Gerry Gaffney

Gerry Gaffney, Director, Information & Design

Gerry Gaffney runs Information and Design (<http://infodesign.com.au/>), a UX consultancy based in Melbourne. He runs the User Experience Podcast (uxpod.com (<http://uxpod.com/>), which he established in 2006.

He’s co-author of “Forms That Work: Designing Web Forms for Usability” and “The Usability Kit,” as well as a contributor to other books.

He’s a former Director of Publications at UXPA (the international User Experience Professionals Association) and former Managing Editor of its User Experience magazine (uxpamagazine.org (<http://uxpamagazine.org/>).

He's also lectured in User Centred Design at undergraduate and post-graduate levels, and has presented and run tutorials locally as well as in Europe, North America and Asia.

He consults to a wide variety of organisations in the public and private sector and is passionate about designing better online services.

Nicola Lambie, Head of Sales Transformation, CUA

Nicola is a visionary and transformational leader in financial services and is focused on re-imagining a financial well-being experience for our customers of today, and the future.

As a Sales and Service leader for over 20 years, Nicola has worked for progressive organisations such as VISA, Suncorp and Pinpoint Marketing, as well as Aegon UK. Most recently, she has held a variety of roles in CUA spanning Marketing, Digital, Operations and Sales. Highlights include delivering the first Community Hub concept in Toowoomba, QLD, launching iM CUA, Australia's first digital app with a human advisor and delivering CUA's Contact Centre transformation program.

Focused on leveraging the convergence of digital and physical channels, Nicola is adept at strategically connecting dots between concepts and ideas and turning them into implementable, commercial business plans.

Jo Devery, Chief Operating Officer, Winning Group

Jo Devery is the Chief Operating Officer of family-owned, Australian retail entity, Winning Group. Jo holds executive accountability for the Group's Winning Services and Home Clearance businesses, as well as for the Customer Experience, Commercial and Team Experience business units.

Jo is focused on the fast growth and transformation of the Group's constantly evolving business model. Jo's success lies in her ability to deliver business goals through the understanding of the end-to-end retail supply chain and her ability to lead & engage stakeholders.

Previously, Jo held senior management positions with Lux Group, Big W, Kmart, Myer and Pacific Brands in Australia and Asia. Jo is a member on the Australian Institute of Company Directors.



Nicola Lambie



Jo Devery