

Chief Customer Officer Forum

The Radisson Plaza
Sydney
16 - 17 May 2011



Chief Customer Officer Forum

How Our People Make the Difference



Welcome from the CCO Forum Committee

Welcome to the fourteenth meeting of the Chief Customer Officer Forum, on behalf of the member committee and Limebridge Australia. The theme for the day is “How Our People Make the Difference”. Surprisingly, this is the first time we have specifically focused on the people behind the customer experience. Within this theme we have a diverse program today, covering everything from measurement to our role as high performance leaders.

Our opening key note and guest for the day is Mr Andrew May who has worked with some of the Forum members and been given rave reviews. Andrew is possibly Australia’s leading performance psychologist and will provide the Forum members with a way to re-think human performance as well as leading cases through the day. We will change tack slightly at the end of the day and be challenged by Rachel Botsman to re-consider the relationship between organisation and customer. Could collaborative consumption be the next revolutionary business trend?

We welcome three guest case leaders from outside the Forum in Paul Cahill from inet, Paul Kernaghan from Allianz and Jackie Giles recently of Vodafone. There are three Forum member companies presenting today but Alanah Searls of the ANZ and Lorena Healey from Seek are still guests for the day. We’ve persuaded the Energex team of Dayle Grant and Mike Swanston to share how they dealt with the three crises in three months. For the first time we have a new “Limebridge sponsored” session and Steve Mitchinson will lead an interesting case on using the Herman techniques to enable customer engagement.

There are a number of new members to meet over the day so please make sure you take the time to meet

- Rona Ludgate from AMP
- Anthony Sinclair from AGL
- Michael Davey from SEEK.com
- Terry Paroz from, Telstra
- Paul Joseph from Origin Energy
- Julia Oxley from South East Water

This year we are pleased to launch the new Chief Customer Officer Website. This website will provide information and materials about past and future Forums as well as member profile details. Much of the site content will be restricted to members only and we will be providing you with your log in details in the near future. Later today there will be a demonstration of the new site.

We hope you find today both valuable and enjoyable.

Dayle, Michelle, Geoff, Andrew, Tony and David



Agenda

Monday 16th May 2011

- 6:00pm – 7.00pm The Backstage door Sydney Opera House for Masterclass with Matt Moran and pre-dinner cocktails
- 7.00pm – 10.00pm The Utzon Room for dinner
The Opera House, Sydney

Tuesday 17th May 2011

Radisson Plaza Hotel
Marble Room
27 O'Connell Street, Sydney

- 8:00am Registration and Coffee
- 8:30am Welcome and Introductions
- 8:45am Opening Keynote: Mr Andrew May
- 9:45am Coffee recharge!
- 10.00am Break Out Session 1
- 11:15am Morning Coffee
- 11:45am Break Out Session 2
- 1.00pm Lunch
- 2:00pm Break Out Session 3
- 3:15 pm Afternoon tea
- 3:35pm Future Insights – Ms Rachel Botsman
- 4:35pm What did we learn and what next for the CCO Forum?
CCO Forum website demonstration
Closing questions and wrap up
- 5:00pm Meeting Close





Editorial – Applying the lessons of start ups to staff engagement

Few members of the Chief Customer Officer Forum would argue that a customer focused culture and highly engaged workforce make a difference to customer service and sales. However, many of the companies put up as cases for highly engaged workforces were built from the ground up with customer and performance in their DNA. Zappos seems to be the latest and greatest but before that other start ups like eBay, Salesforce (now Salmat) Australia and the Virgin empire have been lauded for their people practices and the associated impact on retention and satisfaction.

Does this mean that a Chief Customer Officer or CEO in a bricks and mortar company with a legacy culture can't achieve these same levels of staff engagement and customer focus? We think not. In fact many of the lessons of the start ups can be re-applied in older, more established businesses. However it takes energy and persistence and you have to ignore the short term focus of stock market analysts. Some of the keys to success from these start ups seem to be visible leadership commitment, active staff engagement and re-aligned customer metrics. Let us look at each of those.

Each of the well known start ups has a leader famous for their people focus (Branson, Meg Whitman, Graham Turner). These leaders seem to communicate the importance of people and certain behaviours within the business relentlessly. The legacy business turnaround stories are also closely associated with the CEO's who have advocated and then driven these changes. John MacFarlane at ANZ, Ralph Norris at CBA or James Strong at Qantas all made people engagement and the customer key to their strategy. These leaders have painted a picture of the culture and behaviours they want and not surprisingly, people have followed.

The second key ingredient seems to be direct staff engagement in the change process. In start ups, it is easier to do that as the CEO/founder can get closer to the front line. In large company turnarounds it means finding ways to let the workforce take some ownership of the change process. At Limebridge Australia we engage front line staff in process redesign as it creates credible champions for the change. Similarly the "breakthrough" program at ANZ involved workshops and front line input across the whole business. The CBA story seems similar.

A third critical factor is the re-alignment of measures that work. While companies like Zappos have always measured the front line on customer feedback, many of the turnaround stories share a theme that staff were given clear customer focused measures for the first time. Other examples illustrate that people can be shifted by making a simple customer goal. Prudential spin off "Egg" in the UK found that giving staff just one goal, resolution, drove improvements across not just customer satisfaction but productivity and quality metrics as well. One unifying customer metric seems very important.



So our conclusion is that, while it is harder for large and older business to engage staff on customer issues than start up businesses, the same lessons can and should be applied; get out front and communicate, engage staff at all levels and create a unifying and simple customer metric. What are we waiting for?

David Jaffe, Peter Morrison and Graham Howard

Opening Keynote - The Science of High Performance

Andrew May has taken the high performance secrets of the sporting world and proven, time and again, that they apply in business. In this session he will describe the four key elements of performance and what they mean. He will help you understand not only how to improve the performance of your organisation but things that are crucial for your own performance. He will share stories and lessons from champion teams in the sport and business world and give us all a framework to re-think human performance.

Breakout Sessions

A. The Energex story: Importance of Contingency Planning when Disaster Strikes

Energex had to action many of its disaster recovery plans and handle exceptional interaction volumes when two floods and a cyclone hit Queensland over the summer. The preparation and planning for these exceptional events paid off and Energex's reputation and standing increased. This case will let you benchmark your organisation's ability to handle any crisis scenario. It will provide invaluable insights on what worked well but also explain what Energex learnt from the experience in areas such as media handling and use of social media. If you think your DRP may not cope or you have no plans for handling system or media driven crisis, this session will be invaluable.

B. Seek. Com: A case study in the value of workforce engagement for customer facing staff

Seek.com has won multiple awards for its workforce engagement. The GFC tested Seek's commitment to this level of engagement but then re-inforced why people are at the heart of their business. HR manager, Lorena Healey, has been instrumental in building the culture and the staff interaction model. She'll discuss how Seek.com has been able to measure and prove the value of staff engagement across the business. She'll set out the building blocks on which this engagement is built.

C. Putting the Science of High Performance into Practice

Andrew will take two elements of performance, productivity and recovery and show you how to apply them personally and in your company. The session will include exercises that will help you diagnose your own opportunities and issues. He'll expose you to new ideas like recharging,





the types of stress and how productive people prioritise differently. This should lead to some fascinating discussions on the applicability amongst your peers, management team and front line.

D. How inet uses transactional feedback to manage front line staff and retain customers

inet was one of the early adopters of immediate feedback post contact based on Net Promoter Score. They obtain high rates of feedback as well as the leading score in their industry. They have used this mechanism as a way to change other aspects of their operation such as how staff are measured, how they are rewarded and related processes such as quality sampling. They have also explored what impact this feedback has on customer churn and how to manage that. In this discussion Paul Cahill will cover how their operations have changed and their lessons learnt.

E. How ANZ Bank Creates and Measures Three Dimensional Service and Sales at the Front Line

Effective service measures are a holy grail for many companies. ANZ service teams need to be fast, efficient and friendly to customers. Sometimes the associated measures seemed contradictory to the staff and they struggled to achieve an appropriate balance between them. Alanah Searls, who run the service teams will describe how they now manage a range of metrics and how these KRA's have evolved. She'll describe how making this work involves everything from staff education to active team leader management and the impact of getting these measures right for the customer and business.

F. How Allianz Overcame Internal Obstacles to Create a Customer Orientated Company

Five years ago when Allianz started measuring Net Promoter Scores in Australia there was cynicism across the business about that measurement and the criticality of the customer experience. In this case, Paul Kernaghan will describe how measurement and rewards have made this everyone's problem. He'll give a frank appraisal of what NPS is and isn't good for and describe the types of change that have come about through this process. He'll also describe how they have "sustained the rage" over this period and the business outcomes produced.

G. Lessons in why the Customer should always Stay Top of Mind

Vodafone have previously shared at the CCO Forum their measurements and customer experience design methodologies. The merger with 3 led to some new challenges and a very different focus within the business. Jackie will describe how over 18 months a combination of short term measurements and an extensive integration programme led to very different behaviours across the management team. She'll describe the costs of that approach and share how crises were necessary to shock the business back onto a more customer oriented path.



Limebridge Australia Sponsored Topic:

H. How Telecom New Zealand Improved Customer Emotional Engagement

Telecom New Zealand were looking for ways to create more emotional engagement with customers. They needed a mechanism to help staff recognise the types of customers they were dealing with and how to engage with them. Hear how they exploited Herman Brain Dominance and Whole Brain thinking as a mechanism to create almost instant rapport and engagement. The results have been so outstanding that they have been externally audited and reported. A great case study in finding a simple but effective way to unleash the potential of front line staff.

Guest Speaker Biographies

Andrew May – High Performance Coach

Andrew May is recognised as Australia's leading expert on performance and productivity. He runs a successful Performance Clinic in Sydney that specialises in executive coaching and workplace training. The Performance Clinic offers solutions for individuals and teams to achieve greater productivity and sustained peak performance. Andrew is a best-selling author of 4 books including Flip the Switch, Between Jobs, the Redundancy Survival Guide; and Switched On Health and Wellbeing Professionals Volumes 1 & 2. Andrew has been performance coaching elite athletes and executives for more than 15 years. He is at the forefront of his industry, constantly breaking new ground and leading the way when it comes to the Science of High Performance. Andrew's programs are the only scientifically proven Performance Coaching programs measuring the psychological and physiological effects of stress and recovery for executives and corporate workers.

Rachel Botsman – Social Innovator and Author

Rachel Botsman is the co-author of the influential book What's Mine is Yours: The Rise of Collaborative Consumption (HarperCollins, 2011). She is a social innovator who writes, consults, and speaks on the power of collaboration and sharing through network technologies, and on how it will transform business, consumerism and the way we live.

Her work has appeared, and she has been quoted as a thought leader, in The Economist, CNN, Harvard Business Review, Wired, Bloomberg News and The New York Times. Rachel is a regular contributor to the Australian Financial Review on topics related to technology and innovation. She is an inspiring speaker and has presented high profile events including NESTA, The Clinton Global Initiative, TEDx, GOOGLE, No.10 Downing Street and Microsoft.

She is the founder of CCLab, an innovation incubator that works with start-ups, big businesses and local governments to deliver innovative solutions based on the ideas of collaborative consumption.



Andrew May



Rachel Botsman



Lorena Healey

Lorena Healey – SEEK.com

Lorena is the HR Manager for SEEK Limited, Australia and New Zealand's number one destination for jobs and careers. Lorena and her team of HR generalists and learning and development consultants create initiatives to attract, develop, retain and engage talented employees, who contribute to making SEEK an employer of choice.

Commencing her career as an Accountant, Lorena worked in recruitment, prior to transitioning to HR, and has since spent time designing and executing strategies for Talent Management, Performance Management and Learning and Development. Lorena maintains a primary focus on engagement, by creating initiatives that ensure SEEK is regarded as a place where people can grow their careers and share in the success of a profitable business, whilst having fun at work.



Paul Cahill

Paul Cahill - iinet

Paul has a career in contact centres spanning 20 years, both managing contact centres and in the contact centre vendor space, working with a range of companies including Radio Rentals, Aussie Home Loans, Sony and Ozemail.

During Paul's time at iiNet he has successfully implemented several major initiatives including Net Promoter Score which has grown from -10 to a world class +56, a "work from Home" program servicing almost 200 staff, as well as an expansion to South Africa and New Zealand of 500 staff delivering a true follow the sun model. His current role as General Manager of Contact Centres, has him responsible for the development and operational performance of iiNet's Customer Contact division, with a total of over 1600 staff, as well as managing Customer Satisfaction and the assisted Sales Channel for the iiNet and Westnet Brands.

Paul was recently named CSIA's Customer Service Executive of the year, WA (2010) and won Large Contact Centre of the year for WA in both 2009 & 2010 and NSW in 2010.

Paul Kernaghan - Allianz

Paul is the Chief Market Manager for Allianz Australia and joined the company in 2004.

One of Paul's key responsibilities is to drive the Company's Customer Focus program across the 3,300 employees based within Australia. The Allianz Australia Customer Focus Program concentrates on improving both customer processes as well as staff engagement with customers. The program introduced the use of the Net Promoter Score (NPS) methodology and pulled on many change levers to improve the way the company's employees interacted with customers. The Allianz Program has contributed to considerable revenue growth in recent years.



Paul Kernaghan

Paul has worked in Financial Services for over 25 years with Senior Management responsibilities including Strategic Planning, Marketing, Finance, Mergers and Acquisitions and Post Merger integration.

Jackie Giles

Jackie Giles has worked in the telecommunications industry for the past 21 years in the UK and Australia, principally within Cable & Wireless, Optus and Vodafone (now Vodafone Hutchison Australia). Jackie has held a wide range of senior level roles covering financial, operational and commercial activities. In her most recent role, she was the General Manager responsible for customer experience and research, TIO complaints management, the company wide implementation of the NPS programme and the cross functional customer experience roadmap. Jackie also served as VHA's representative on the TIO Council.

Alanah Searls – ANZ

Alanah Searls is the Head of Service for ANZ's Customer Contact Centres, covering 3 sites in Australia and New Zealand and 400 staff. Her focus in this role is to deliver excellent customer service standards for the 9 million customer calls received by her area annually. ANZ enjoys high customer satisfaction levels and the challenges are in delivering to this expectation within tight budgets. Alanah was previously with ANZ Insurance.

Her experience cover stints in Australia and New Zealand for Westpac as a regional manager for branches, delivering sales and service targets and large change programs from the late early 2000s to 2007. Prior to Westpac she was the National Retail Manager with the Lincraft group of stores and she has also worked in Tourism NSW, Johnson & Johnson Medical and in the retail sector generally over many years. Along the way she has acquired a graduate certificate and diploma in management and an MBA from UNE Armidale.

Steve Mitchinson – LimeBridge Australia

Steve has been employed in a number of customer management roles with some of Australia's most successful enterprises and has over 20 years experience successfully delivering complex change programs that have improved efficiency and delivered award winning customer service outcomes in the consumer, commercial and public sectors.

After working in significant roles with BOC Gases, Dept Planning & Infrastructure (WA) and SOUL Communications, Steve commenced his own business, TeamRed Solutions in 2007 joining LimeBridge Australia this year.

Steve is based in Perth and specialises in customer service and business transformation and the application of Herrmann Whole Brain Thinking™. Steve was recently the National Chairperson of the Australian Teleservices Association.



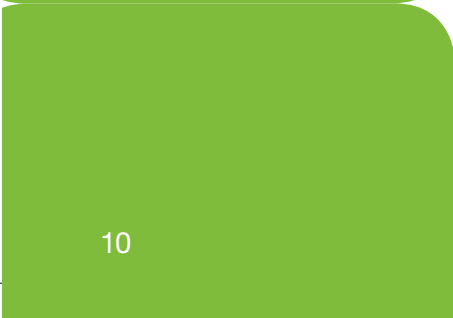
Jackie Giles



Alanah Searls



Steve Mitchinson



Chief Customer Officer's Action Check List

	Issue or aspect of our end to end customer experience that requires my attention	What changes will I make to improve the delivery of our end to end customer experience
1		
2		
3		



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