



# Chief Customer Officer Forum

Key Changes for the Next Decade



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## Welcome from the CCO Forum Committee to our 10<sup>th</sup> Anniversary

It's hard to believe that it's ten years since the first meeting of the Chief Customer Officer Forum. Time flies when you are having fun. At the first meeting the inaugural twenty five attendees suggested that the emphasis on round table discussions was a good format and that the group should meet twice a year and perhaps do an in depth site visit mid-year. It was also the group's idea to have a member committee to provide some governance over the whole thing.

Over the ten years we have also concluded that it is good to start and end the day with something thought provoking. Our kick off presentation today is from John Winning. John will give us the story behind Appliances Online. A number of members suggested Appliances Online as an exemplar digital business that also offers great service and hence we seek John out. You'll note that the digital theme is one of the "key future trends" that comes up in a number of the cases through the day.

We think you'll have been spoilt for choice when picking your sessions to attend. We asked David Heymann from Google to join us as we felt that they represented a future focused culture. Interesting to think that ten years ago Google's revenue was less than 10% of what it is today. Nick Adams from Telstra is another guest case presenter. As a digital marketing expert, again we felt Nick could help us understand what is working for Telstra in that area. New member Michael Volk kindly agreed to describe the digital journey of the Queensland Police.

We have some other discussions that we are sure will be very strategic. Our own Peter Walker will summarise some of the key trends in the demographic and financial landscape that all businesses need to understand which the ATO tracks and uses. Iain Kiernan and Carl Muller will share their experiences of a customer and data driven transformation at EPA Victoria. Merril Hotchkin and Dee Hovey from Metricon will describe how and why Metricon homes has rethought their customer experience in what we think is the ultimate customer experience.

We have two returning members who have gone on to run different businesses. Andrew Hume has led both a major insurance business and two of the best known outsource providers so has a unique perspective from "both sides of the fence". Jim Galvin has been involved in multiple business transformations and will share some of his learnings in that area and chair a discussion on how to get management attention on customer issues. Our last round table will be run by LimeBridge who have researched success stories in Omni-channel delivery.

Finally, we will end the day with one of Australia's leading experts in performance. While Richard Charlesworth is most famous as a sports coach, he will challenge us on what business can learn from sport and discuss his approach to high performance teams.

It should be a great day and please join us in welcoming some new members and guests and let's look forward together to the next ten years.

Michelle, Andrew, Tracey, Peter and David





## Agenda

### Tuesday 21 October 2014

6:30pm – 7:00pm Arrival drinks Vue de Monde, Darwin Room

7:00pm – 10:30pm Dinner at Vue de Monde, Darwin Room

### Wednesday 22 October 2014

The Langham, Melbourne  
Alto Room

8:00am Registration and Coffee

8:30am Welcome and Introductions

8:45am Opening Keynote: John Winning, Appliances Online

9:45am Coffee recharge

10:00am Break Out Session 1

11:15am Morning Tea Break

11:45am Break Out Session 2

1:00pm Lunch

1:45pm Break Out Session 3

3:00 pm Afternoon Tea Break

3:30pm Closing Keynote: Richard Charlesworth, Professional Coach

4:30pm Closing questions and wrap up

5:00pm Meeting Close and Drinks







## Editorial – Looking Back and Forward Ten Years

It's fascinating to look back ten years and see the state of the Customer world back in 2004. It was a very different world and change has been rapid. For those that don't remember, the so called dot-com crash had just occurred and there were only a few digital success stories and lots of failures. The companies most frequently critiqued for their service were the Telco's after the previous ten years of 'bank bashing'. While India was being seen as an offshore location for IT and process, almost no Australian call centres had gone offshore and Manila wasn't mentioned as a destination. Web chat and social media weren't even in the lexicon, let alone big data. The iPhone didn't exist so no one knew what an App was.

Looking at the topics we covered in 2004, we certainly didn't anticipate some of the things that have occurred since. However, we did all believe that customer issues would become more important and that change was going to be a key strategic skill set. If anything the business landscape now seems more unpredictable. So strategic success will be in picking the right trends to respond to, rather than playing catch up, as many companies today appear to be. So let's look at three trends that we think will continue and examine the possible strategic response.

We think it's safe to say that digital interaction in all its forms (including mobile and apps) will continue to grow. The next generation doesn't know any other way to operate. However, this means that legacy businesses will be challenged by having the costs of many legacy channels. The winners will be those that manage the digital migration effectively and integrate channels well. For us that means creating consistent and integrated processes and having work and job structures that span channels rather than live in silos. Another success factor will be those who find ways to embrace the multi-media capabilities of mobile and digital which should mean a total re-think of many processes. Then they can exploit things like digital identification, video and customer sharing technologies. This trend will also test current operating models as the new digital channels leave behind more complex work. Operations will also have a greater 'digital support' component that will need to blend with conventional customer support.

It's also a fairly safe bet that social media will continue to give more power to customers to influence each other. They will continue to rate and review and make performance and price visible to each other. The winning organisations will be those who embrace this cost transparency and have the cost structures and service effectiveness to look attractive. On the flip side, it's only a matter of time before survey fatigue sets in. Companies will need to make surveys lower effort and be smarter about





who they ask and how often. A better answer will be to find ways to bring the customer's feedback on external sources into the business and use it. The influence of the external rating sites will therefore increase and create another form of intermediation (think Trip Advisor).

We're also sure that Australian companies will be unable to resist further offshoring. However, this will also get harder as simpler interactions go digital. It will be even more critical to define the process and operating model well to make this offshoring effective. Those that have rushed in will be playing catch up to those who take their time and get it right. Furthermore, companies who have jumped offshore quickly may be vulnerable to those who invest more in elimination and automation. After all no interaction or an automated one is still cheaper than one offshore. Ironically that (Best Service is No Service) idea was a subject we did explore back in 2004, so perhaps the world hasn't changed that much after all.

David Jaffe, Graham Howard and Peter Morrison  
LimeBridge Australia

## Opening Keynote

### John Winning, CEO The Winning Group

When it comes to the topic of how to learn from history for the next decade, our opening speaker, John Winning, knows a thing or two about how to move a business forward whilst retaining elements of its legacy and traditional standards of excellence. Having grown up around his family's century-old appliance retail company, John has been immersed in the unique 'Winning' way his family do business from a very young age. He has seen the last two generations of the family leave their mark on the company and having taken over the reins from his father in 2011, he too has made some big changes to ensure the company is well positioned to operate far into the future. John will explain how he proved himself as a business leader in his own right and brought about change while at the same time paying tribute to the family's heritage and rich history with the company.

## Breakout Sessions

### The CEO Perspective From Inside and Outside an Organisation with Andrew Hume, Former CCOF Member and now CEO Business Process Outsourcing, Probe Group

Andrew has been CEO of three different businesses in Australia. He ran the Salmat call centre business and then went client side as Managing Director of Hollard Financial Services (HFS) in Sydney who are a leading







Direct Insurance brand. Most recently he was CEO of Aegis in Australia. So Andrew has seen business from both sides as both supplier and business leader. He was instrumental in Salmat (Salesforce) winning multiple Hewitt awards for best employer and has achieved growth and success in all the businesses he has led. Andrew was a founding Board member of the CCOF between 2005 and 2008.

Andrew will lead a breakout discussion around:

- What separates great employers from others
- What I learnt in my CCO role that helped me be a better CEO
- How to deliver great experience through partnering arrangements

### **The Hard Lessons of Multiple Transformations with Jim Galvin, Former CCOF Member and Executive Director Retail Markets, Alinta Energy**

Jim is probably amongst Australia's most experienced utility executives with a terrific track record of business improvement. He is currently Executive Director Retail Markets at Alinta Energy and charged with growth of their retail business. Most recently he helped turnaround Origin Energy and led the transformation that Jon Briskin described at our last meeting. His earlier career was spent at AGL where he was involved in growth of the retail business and another transformation. Jim has overseen the implementation of SAP into both Origin and AGL which involved the consolidation of multiple billing and CRM applications into a single platform and understands firsthand the challenges associated with managing the change process from the boardroom to the frontline and onto the customer. Jim joined CCO Forum in 2005 and he looks forward to spending time with the Forum again.

Jim will lead a breakout discussion around:

- What he's learnt through multiple transformations of large businesses
- How to get the CEO's attention on customer issues
- Why ex CCO's make the best CEO's

### **The Customer Driven Transformation of the Environment Protection Authority Victoria**

In early 2010 EPA was in a deep and very public hole. The auditor general chastised them for their inaction and role in several environmental incidents and failure to manage hazardous waste. There was no guarantee that they had a future. Enter new CEO, John Merritt and set out a clear customer centric focus that was later enabled through the strategic application of data. Speakers Carl and Iain joined forces to enable John's straightforward and compelling vision for the management of Victoria's environment, the engagement of the community and help





maintain Melbourne's position as the world's most liveable city. This is a compelling turnaround story of an entire business and our presenters will discuss the keys to the turnaround and the other lessons learnt.

### **The Strategic Landscape; the Changing Face of Australia and the Region, ATO**

The Australian Tax Office has to understand not only the key demographic trends in Australia but also the impacts of other changes in the region that will impact Australian business. Peter Walker will share some of the key insights of the ATO on trends such as digital disruption and who is being hit, the trends in our productivity and competitiveness and the key trends in Asia that impact Australia. This will also be a discussion of what Australia needs to do just to stand still and the implications for business and government. If you want to understand the landscape for any new strategy or plans, this is your topic.

### **The Ultimate Customer Experience – Changing Focus at Metricon Homes**

Buying and building a home is among the longest 'customer journeys' and the scale of the financial commitment makes it critical to customers. But the importance and visibility of the experience changed when review sites started to enable customers to go public with their ratings of the building companies. All the companies, including Australia's biggest home builder, Metricon, had to rethink all aspects of dealing with customers. Merril Hotchkin and Deanne Hovey have been instrumental in re-shaping the Metricon customer experience. They will tell a fascinating story about tackling a "building and cash flow" focused culture and describe both the things that worked and lessons learnt along the way.

### **Beyond The Lava Lamps: An Inside Look at Google's Unique Culture**

Google has created a unique culture that drives innovation and a relentless focus on the user in over 70 offices around the world. But pushing aside the lava lamps and free food - what are the real building blocks of that culture and how do they maintain it over time? David will discuss what this culture really looks like and how everyday management challenges like hiring, retention and diversity underpin it. He will also share some of the inspiring customer stories that this culture has helped to create. This will be a fascinating discussion that will make us question how we recruit and manage people in any business.







## Case Studies in Successful Omni-Channel Sales and Service Delivery, LimeBridge

Omni-channel has become a popular buzzword in sales and service delivery and is a strategy that many companies are pursuing. However, the challenges of integrating channels are not new but now there seem to be more to integrate and the problem has become more complex. In this discussion, LimeBridge will draw on a series of case studies to illustrate four key barriers to success and the methods that have been applied to make Omni-channel a success across a range of industries. The discussion will also look at customer expectations across channels and the balance between customer and business need. The discussion will suit anyone whose business is on an Omni-channel journey.

## How Telstra Used Big Data, Analytics and CRM to Deliver Revenue and Loyalty

Telstra's customer turnaround story has been very public. But, under the covers, they have been doing some remarkable things with data and customers to driver revenue and loyalty. In this case Nick Adams, who has led much of their data and digital transformation, will discuss the enormous returns they have had on their CRM program, their advances in digital marketing and then the outcomes of two crucial loyalty strategies that have had dramatic impacts on key measures such as NPS. This is a fascinating case of an organisation using data and multiple channels to get closer to their customers and rethinking the strategies they need to drive loyalty.

## Queensland Police Digital Transformation – 20 Years of Channel Shift in 20 Months

In 2008 Queensland Police Service (QPS) had no digital services for either the police or public to interact with the department. Contact management was conducted by phone services to over 500 establishments and 350 front counters. The triple zero network was the only central point of contact and had become dysfunctional with clients using it for all manner of police business. Hear how Queensland Police shifted this work to a central call centre and uses digital services to handle 500,000 crimes per year and is shifting contacts to digital at a rapid rate. Michael will describe how the change occurred, the savings made and the impacts on customers and the police force.





## Closing Session

### Building a High Performance Team: Can We Apply the Lessons of Sport to Business, Dr Richard Charlesworth

In our closing session, Australia's most successful coach, Richard (Ric) Charlesworth will talk to us about high performance and team work. Not many coaches have been effective with both male and female teams or coached in one code (Hockey) when succeeding in another (he played cricket for WA). While it can be dangerous to apply lessons from the sporting world to business, Ric has considered issues of individual and team performance at a level that can be applied in any organisation. Ric will talk also about how business can learn from sport whilst recognising the differences.

## Guest Speaker Biographies

### John Winning, CEO The Winning Group

John Winning started his career as a door-to-door salesman before working for his father's business, Winning Appliances, as a delivery truck driver. Not wanting to be handed his family's business on a platter, John set out to pave his own way in business.

It was while working at Winning Appliances that John recognised that there were a growing number of time-poor consumers who needed new whitegoods but didn't have time to visit the shops. So in 2005 at just 21 years of age John founded his first online business Appliances Online with just a laptop, a rented truck and a 1300 number diverted to a mobile phone. From such humble beginnings, Appliances Online now employs upwards of 250 people and is Australia's largest online retailer of whitegoods and appliances.

Today, John has since taken over the reins of the family business and formed Winning Group; an Australian retail entity driven by a single-minded focus on the satisfaction of its clients and customers. The retail group incorporates four distinct business entities: century-old traditional bricks and mortar retailer Winning Appliances, online retailers Appliances Online, Big Brown Box, and national installation company Handy Crew.

John has played a vital role in successfully integrating innovative business practice with traditional standards of excellence – his strategy and vision for the future will ensure the group continues to hold a dynamic presence in the retail market.



*John Winning*



### Richard Charlesworth

Richard (Ric) Charlesworth is one of the best-known hockey players and coaches in the Australian hockey history. A former captain in the Australian Hockey Team, he played hockey for Australia for a record 16 years. As coach of the Australian Women's hockey team, his unique coaching formula contributed to their success at the Atlanta and Sydney Olympics Games. For 8 consecutive years the team was ranked number one in the world.

In 2009, after Ric was appointed coach of the Australian men's hockey team, the Kookaburras, the team went on to win the Hockey World Cup in New Delhi in 2010, again in The Hague in 2014 and gold at the Commonwealth Games in 2010 and 2014. In 2011, the Kookaburras won the Champion Trophy for the 4th consecutive year...the first team to do so in the 32 year history of the event. In 2012 the Kookaburras won a Bronze medal at the Olympics in London. Ric was elevated to Legend status in 2013 through the Western Australia Institute of Sport.

He has worked with the Australian Institute of Sport as a mentor coach to 5 national team coaches. He was Australian Coach of the Year in 1994, from 1996 to 2000, and again in 2010. Ric has been technical advisor to Indian hockey teams and High Performance Manager of New Zealand cricket.

Ric is also a doctor of medicine and the author of 3 books on coaching. Described as one of the world's best coaches, 2001 he was appointed Master Coach by the International Hockey Federation.

In 2003 he received an honorary Doctorate of Science at the University of Western Australia and completed a Bachelor of Arts majoring in philosophy and history at the University of Western Australia.

### Peter Walker, Assistant Commissioner, ATO

Peter Walker is the Assistant Commissioner for Customer Service & Solutions sub-plan within the ATO. Peter has been with the Australian Taxation Office for just over 2 years. Prior to this he was an Executive Director for CCD Consulting Pty Ltd.

He has accountability for:

- Development of service delivery and business improvement strategy's for ATO customer service operations
- Development of multi-channel service delivery model for 3500 staff in Operations
- Management of complete replacement of all ATO Contact Centre infrastructure



*Richard Charlesworth*



*Peter Walker*





*Nick Adams*

- Development and implementation of technology programme and projects
- Development and implementation of business model design
- Development and implementation of business improvement initiatives

### **Nick Adams, Director – One to One Marketing, Telstra**

Nick Adams is the Director One to One Marketing and Digital at Telstra and is responsible for all one to one acquisition, engagement and development programs at Telstra. Prior to joining Telstra, Nick was the CMO for Westpac and held a number of senior marketing leadership positions. Nick has also lead major marketing teams for leading companies such as American Express, Citibank and MBF.

Nick is one of the most awarded marketers in Australia having been identified as one of the four young stars of Australian marketing at the 20th Anniversary edition of Marketing magazine in 2004. In November 2009, Nick was awarded Australian Direct Marketer of the Year by ADMA. In 2011, Nick was named one of the one of eighteen marketing leaders globally by Internationalist Magazine as a leader in marketing and marketing innovation,

Nick is an active member and supporter of the Australian Direct Marketing Association having held various committee positions.

### **David Heymann, Head of Strategy & Operations, Google**

David is a Business Development executive who has led both deal teams and strategy and operations groups in Australia, USA and Asia. For the last 7 years he has been working at Google in a variety of roles both in Sydney and the global head office in Mountain View, California.

He is currently the Head of Strategy and Operations - APAC Publisher Business Solutions, leading a team of crack analysts and strategist that guide Google's commercial relationships with major publishers and app developers across the region.

Prior to Google, David worked in Financial Services for 12 years with Tower Australia, MBF and Colonial. He has a Bachelor of Economics and an MBA from Macquarie University.

### **Merril Hotchkin, General Manager, People and Business Improvement, Metricon Homes**

Merril Hotchkin joined Metricon (one of Australia's largest residential home builders) four years ago just as the industry reached one of its lowest



*David Heymann*





points in a decade. As head of Strategy and People at Metricon, Merrill now leads a major transformation program to refocus the organisation on delighting its customers and building its people and systems capability.

Merril has over 25 years of experience in leading organisations through change. She has worked in both national and global consultancies as a change specialist across the construction, high tech, government, banking and telecommunication industries in Australia and overseas. Much of her experience has centred on delivering large scale projects, from major systems implementations to large scale organisational restructures.

Merril is an MBA and Masters of Marketing graduate from Monash University. She has worked as a sessional business lecturer at Deakin and Monash University in Organisational Behaviour, HR Strategy and Marketing.

Merril is passionate about increasing both organisational and people capability through a focused and united approach to strategy formation and execution.

Joining Merrill at this year's CCO Forum, will be Metricon's National Customer Experience Manager, Deanne Hovey.

### **Iain Kiernan, Director, Data Agility**

Iain is a Director of Data Agility and a member of the executive management team where he actively participates in the evolution of the company's strategy. Iain's technical focus is the effective business application of information and data - he leads Data Agility's Information Management and Business Intelligence capability. He is an adviser on information strategy, customer strategy and the application of data to Chief Officers of Australian organisations manages relationships with clients and Data Agility teams delivering architectural, implementation and support services.

His role applies his technical leadership in this field and requires a significant formal and informal executive coaching of staff and senior client personnel. Prior to joining Data Agility Iain held executive positions with ANZ and KPMG Consulting where he gained substantial strategic customer, business, data, technology and management experience.

Iain Kiernan spent much of the past five years working together with Carl Muller at EPA Victoria, to transform the way that Carl's organisation(s) transform the way they engage with their customers.



*Merril Hotchkin*



*Iain Kiernan*



*Carl Muller*

### **Carl Muller, Director - Corporate Services, EPA Victoria**

Carl Muller has spent much of the past five years working together with Iain Kiernan to transform the way that Carl's organisation(s) transform the way they engage with their customers. Carl is currently Director of Corporate Services at Sustainability Victoria (SV) and prior to that was Transformation Program Manager for Environmental Protection Authority Victoria (EPA).

### **Andrew Hume, CEO, Probe Group**

Andrew Hume is the Chief Executive Officer of Probe BPO. Andrew joined Probe in 2014 to take responsibility for the continued growth of Probe's BPO business. Probe has more than 35 years' experience in credit management and debt recovery and has over \$1.4bn under management and an employee base approaching 1,000 people across operations in Melbourne and Manila.

Andrew has worked in executive leadership roles in the business process outsourcing industry since 1999, when he joined Salesforce as GM upon completion of an MBA at the Melbourne Business School. He was soon elevated to COO and subsequently became CEO following the acquisition of Salesforce by Salmat. When Andrew left 10 years later, he was managing a company employing over 5,000 people across 4 countries with a turnover in excess of \$300m. Andrew managed operations in Malaysia and the Philippines, built a trans-tasman work from home business with 500 agents, grew the NZ contact centre operation from 100 to 600 staff, created an integrated online and accredited learning business, launched a customer experience consulting practice, implemented a future operating model that established a hosted contact centre technology offering and implemented a range of operational excellence initiatives that were instrumental in enabling the business to grow into the largest Australian owned BPO provider.

Upon leaving Salmat, Andrew went client side as Managing Director of Hollard Financial Services (HFS), direct distributors of life insurance products under brands including Real and Guardian Insurance; partner brands like Australian Seniors Insurance Agency (ASIA), Aussie Life Insurance, RSPCA Pet Insurance; and affinity partners including Woolworth's Life Insurance, and Medibank Private Life Insurance. Andrew was also responsible for the online insurance comparison site Choosi.



*Andrew Hume*



Most recently, Andrew was CEO of Aegis in Australia, where he was responsible for the Australian business and operations in the Philippines for Australian clients. Andrew implemented a refresh strategy that involved the refurbishment of sites, the closure of underperforming businesses, and a sales strategy which led to the addition of a number of new marque accounts including Pacific Brands, The Good Guys, Toll Group, and Energy Australia.

Andrew was a founding Board member of the Chief Customer Officer Forum (CCOF) between 2005 and 2008. He was Chairman of the Australian Direct Marketing Association Voice Council between 2006 and 2007 during the introduction of the Do Not Call Register and the establishment of ADMA's Do Not Call Register Telemarketing Standards.

### **Jim Galvin, Head of Retail, Alinta Energy**

Jim is an experienced senior energy industry executive with over 25 years in the energy market in both commercial, technical and customer service roles having held a variety of senior executive positions within the energy market both within Australia and overseas. Jim spent 4 years in Chile, South America as the Managing Director of a gas distribution company supplying and marketing natural gas to residential, industrial and commercial customers in the central region of Chile.

Over this time Jim has developed an extensive professional network across the energy industry, consumer groups as well as state and federal governments.

Jim has held a variety of company directorships including QGC, ActewAGL, Elgas, and ombudsman boards in NSW and Queensland and is the recent ex-Chairman of the Energy Retailers Association of Australia (ERAA) a position he held since 2011.

Jim is currently the Executive Director Retail Markets at Alinta Energy.



*Jim Galvin*





## Events

### Past Forum

#### CCO Forum 14 May 2014, Sydney – Customer Innovation and Transformation

At the May 2014 CCO Forum we heard from a number of excellent external speakers and members as well as trialled a new session, Innovation Showcase.

Jan Pacas, CEO of Hilti Australia, opened the day and discussed how Hilti have used service as a strategy to differentiate their products. This was an insightful presentation on how one traditional company repositioned their product offering by adding a full service proposition. This allowed them to grow market share, avoid the retailers and charge a premium for the service. On the journey Jan had to rethink their business processes, realign measures, integrate CEX measurement and kick off a full scale cultural change.

Chief Creative Officer and Co-Founder of Shoes of Prey, Jodie Fox joined us for the day and ran several breakout sessions discussing their unique business model. We also heard from Michael Ellies, COO of Smartsalary Australia who presented a case on their business transformation. Andy Berry (Fuji Xerox) ran a case discussing the impact of moving from paper to digital had on Fuji-Xerox and how it forced the business to re-assess its whole business model. We also heard from member Samantha Bartlett of how the move to digital communications forced Australia Post to rethink every aspect of its business, from store configuration to the products and services it offers. And Jon Briskin, from Origin Energy, spoke of several transformations their business has undertaken – around technology, front line processes and back office and outsourced and offshored partners.

We trialled a new session in the afternoon, the 'Innovation Showcase', which proved to be very popular. We asked each member to research one innovation in their business and present it to the group in a cross between 'show and tell' and innovation 'speed dating'. It was great to hear about all the innovative things our members companies are doing, innovative branch transformation, activity based working, integrating web into the contact centre, mortgage handling transformation, SMS accelerating sales, and the winner, CBA's Dan O'Neill's digital signature transformation taking the inaugural prize of the 'engraved silver can-opener'. Well done Dan!

Ann Sherry from Carnival Australia wrapped up the day, speaking to the group about the turnaround of that business. A great way to end the day,







and everyone in the room suddenly wanted to take a cruise in the near future!

You can download all past case presentations from the CCO Forum website [www.ccoforum.org.au](http://www.ccoforum.org.au).

### Site Visits - August

This year members Andrew Kiel and Peter Walker hosted site visits at their respective companies in Brisbane.

The group visited the ATO Co-Design Centre in the morning where they were able to participate in a simulated test and observation process, in their Customer Design labs. The aim of the centre is to use customer centred design to make the tax system easier, cheaper and more personalised for taxpayers. It brings together a mix of users of the tax system to assist in the design and evaluation of the ATO's products, processes and systems. All were impressed with the level of technology, collaboration and dedication of the team to making tax easier.

In the afternoon the group visited Credit Union Australia (CUA) head office where member Andrew Kiel and colleague Andy Rigg spoke to the group about their strategic differentiation to other financial service providers and how to make this a physical reality in their branches. We then toured their flagship concept store giving the group a behind the scenes look at their innovative design including coffee for members, free pot plant give-aways, penguin coin counters, free standing tellers and connecting with the community through Polaroids! The store was the fourth CUA has opened since it completely rebuilt both its store design as well as operating model from the ground up.

As a contrast Fleur Davidson, CBA Branch Manager, also gave us a detailed tour of the flagship CBA branch a short walk from CUA. Fascinating to compare the two conceptual designs and the execution. CBA had incorporated business banking, forex, online, teller and platinum member rooms to great effect. Certainly opened our eyes to the different alternatives and how to leverage unique characteristics to differentiate service.

Both visits were very well received and we thank Peter and Andrew again hosting such terrific visits.

### Upcoming Forum

The next Chief Customer Officer Forum will be held in Sydney on Wednesday the 27th of May 2015 with dinner the evening before. Venue is to be confirmed.





## Member Highlights

### New Members



**Michael Volk**  
Policelink & Programs  
Inspector – Strategy and Performance  
Volk.MichaelA@police.qld.gov.au



**Sean O'Malley**  
AMP  
Director Customer Service Delivery  
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**Michelle Court**  
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**Amanda McNaughton**  
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**Matt Paterson**  
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**Vicki Flower**  
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**Pete Birch**  
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Read all member bio's on the Chief Customer Officer Forum Website  
[www.ccoforum.org.au](http://www.ccoforum.org.au)







## Past CCO Forum Meeting Topics

Year	Meeting Theme
May 2014	Customer Innovation and Transformation
Oct 2013	The Next Wave
May 2013	The Future Organisation
Oct 2012	Operational Excellence
May 2012	Customer Facing Leadership
Oct 2011	Adding Value To Customers
May 2011	How Our People Make the Difference
Oct 2010	Proving that Better Customer Experiences are Cheaper
May 2010	Connecting with the Customer
Oct 2009	Success Stories from Idea to Implementations
May 2009	Customer Service in the Economic Downturn
Nov 2008	Leading Practices in Customer Experience
May 2008	The Transformation Challenge
Oct 2007	Optimising the End to End Customer Experience
May 2007	Using Technology to Deliver Better Customer Experiences
Nov 2006	Proving the Strategic Value of Service
May 2006	Managing and Measuring Business and Human Performance
Nov 2005	Multi Channel Delivery
May 2005	The Strategic Value of Service
Nov 2004	Inaugural Meeting

All past presentations can be downloaded via member login on the CCO Forum website [www.ccoforum.org.au](http://www.ccoforum.org.au)





Keynotes and Guests	
	Jan Pacas, CEO Hilti Australia Ann Sherry, CEO Carnival Australia
	Honourable Jeffrey Kennett Toby Detter, LimeBridge Scandinavia Peter Massey, Budd UK Bill Price, Driva Solutions Joseph Kort, Activeo France
	Anders Sorman-Nilsson, Thinqe.inc Scott Farquhar, Atlassian
	Megan Quinn, Net-A-Porter Guy Russo, Kmart
	Brett Godfrey, Virgin Steve Simpson, Dr Peter Eilyard and Alistair Mant
	Dr Stephen Lundin, FISH! Bernie Brookes, Myer
	Andrew May - The Performance Clinic Rachel Botsman - Social Innovator and Author
	Mark Bouris, Yellow Brick Road Steve Vamos, Board Member
	Linda Nicholls, Board Member
	Dr Martha Rogers, Peppers and Rogers
	David Morgan, Former CEO Westpac
	MD Ramaswami, LimeBridge India Toby Detter, LimeBridge Scandinavia David Naylor & Peter Massey, Budd UK Bill Price, Driva Solutions Stephen Pucker, Ad Scopum Lynne-Marie Eccleston, Rhea Ian Northmore, Virgin Mobile
	Dick Hunter (De1ll)
	Mark Ritson, Melbourne Business School
s	Jane Hemstritch, former Accenture Asia Pacific Managing Partner Andrew Rowsell Jones, Gartner
	Jeanne Bliss, Customer Bliss Peter Murley (UK)
nce	Shane Garland, Woolworths Kevin Panozza, Salesforce
	James Strong, Chairman IAG
	Prof Paul Paterson, UNSW Paul Harmer, The Brand Surgeon
	Too many to list!

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### 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.		

### Key Takeaways




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