

Chief Customer Officer Forum

Virture CCOD
14 & 15 October 2020

Transforming to at-home work hasn't been easy




Chief Customer Officer Forum

Transform, Fine Tune or Evolve



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Welcome from the CCO Forum Committee

Welcome to our first ever “Virtual” Chief Customer Officer Forum (CCOF). We’ve attempted to bottle as much of the CCO Forum secret sauce as possible so we hope there will be good discussions and a mix of strategic and tactical ideas. The theme for the Forum is, **Transform, Fine Tune or Evolve**, and we’re delighted with the range of speakers and topics that have come together. We had enough speakers for a full day but thought four zoom sessions was enough even though we know many of you are used to long days on video.



It’s a bit of a two-tier Forum as those in Brisbane and Sydney have a dinner to enjoy while Victorians remained locked down and those in other states were also constrained. We tried to construct a day that would be easier for those working from home and hence physical hampers should enable us to meet more informally over lunch and at breaks. The zoom session will be open all day and we’ll move you into break outs twice during the day. It will help if you can be logged into the zoom five minutes before the break outs begin at 9.55 and 11.25.



Our Opening Keynote speaker is **Jodie Fox**, cofounder of Shoes of Prey first who presented in May 2014 and is now back to present on her book, **Reboot – Learning from success and failure at Shoes of Prey**. It is fantastic that Jodie is prepared to share both the success and “learnings” from that business. Our closing keynote, **Greg Hywood**, former Chief Executive of Fairfax Media will present, **Embracing digital survival: the Fairfax story and its relevance today**. Greg remains active in the media landscape and will discuss how digital is changing business models.



We have a great mix of speakers from outside the membership and within. We are fortunate to have **Leah Monica, from Costco** - Assistant Vice President, Member Services Centres, to share the Costco story as the pandemic caused radical changes in the way they operate. **Steve Simpson**, International Speaker and Author will guide us through the methodology of nurturing a culture in a virtual world. **Peter Walker**, Assistant Commissioner at the ATO will discuss their amazing work to keep the country afloat through COVID-19.



Genevieve McLean, Senior Manager – Customer Care Standards, Optus, will share Optus’ use of standards to drive customer experience consistency. **Tim Bennett-Williams**, Head of Service and Support, MYOB, will discuss how MYOB skipped few beats while continuing to transform. **Lisa Pogonoski**, our long-standing Westpac member and Committee Member will share how she has changed the focus on customers through complaint handling.



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

The CCOF Member Committee

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

Agenda

Dinner Wednesday 14 October 2020

Sydney: Restaurant Hubert

6:00pm – 8:30pm

Brisbane: Otto

6:00pm – 8:00pm

Melbourne/ Adelaide/ Perth

5:30pm – 6:30pm Zoom Networking Drinks and then DIY via Uber Eats

Thursday 15 October 2020 - Virtual

8:15am Zoom opens. Settle in for coffee

8:30am Welcome and Introductions for the day

8:45am Opening Keynote: Jodie Fox, Co-founder Shoes of Prey
Reboot – Learning from success and failure at Shoes of Prey

9:45am Coffee Recharge Break

Please be back on zoom at 9:55am

10:00am Break Out Session 1

11:00am Morning Tea Break/ Opt in Networking

Please be back on zoom at 11:25am

11:30am Break Out Session 2

12:30pm Lunch/ Opt in Networking

1:30pm Closing Keynote: Greg Hywood, Former Chief Executive, Fairfax Media
Embracing digital survival: the Fairfax story and its relevance today

2:30pm Closing questions and wrap up

Informal networking

Opening Keynote

Jodie Fox, Reboot:

Learning from success and failure at Shoes of Prey

When Jodie Fox spoke to us in May 2014, Shoes of Prey were a poster child disruptor lauded in the investment community. Sadly, the business closed in 2019 despite unique IP and a fanatical customer base. It is a fascinating story of how hard it is to get penetration in a mass market even with a great product adored by those who bought it. Jodie will also describe what it was like changing from being a virtual to a physical business and back, something we are all going through. Jodie has reflected on this experience and the lessons from it and will share the ideas she has taken away. This should be a fascinating discussion on concepts such as which customers to pursue, models of growth, physical and virtual working and the impact of culture on learning from failure. Jodie's book called "reboot" will be available to all members.

Breakout Sessions

Tim Bennett-Williams, Head of Service and Support, MYOB:


Multi-dimensional change at a digital native: the MYOB story

The transition to working from home for MYOB was relatively seamless as those capabilities were already mature in the business. Their challenge was in handling the avalanche of enquiries from customers dealing with job keeper and payroll issues that their products support. This didn't stop the company's broader transformation agenda. Through this period, they continued with business restructuring and a build out of virtual processes for all HR processes such as recruitment and training. They quickly recognised that virtualising everything was essential. They are already on their second generation of virtual processes demonstrating their agile software heritage. This case should be a great illustration of the flexibilities and capabilities that may be essential in a post COVID world.

Genevieve McLean, Senior Manager – Global Care Standards and Assurance:

How Optus created one set of Standards to enable consistently amazing customer experiences, every time

With global customer care operations spanning 4000+ people in 14 different sites throughout Australia, India and the Philippines, and with multiple BPO partners, in 2018 Genevieve McLean helped Optus understand their unprecedented opportunity to have stronger consistency throughout the operations to improve CX and EX.



Gen will share with us how she and her team developed a Globally award winning Standards program underpinned by quality assurance practices, strong governance, data driven risk interception and mitigation, and a unyielding commitment to the most important asset Optus has... their people.

Gen will also share how the Standards program enabled Optus to pivot with agility during COVID19 to keep their customers connected, and their employees safe.

Leah Monica, Assistant Vice President, Member Service Centres, Costco Wholesale:

Thinking outside the big box: How Costco had to redesign itself

Costco in the United States has been through three dramatic changes in the last six months. Moving 1900 membership support staff to at-home work was a challenge but simultaneously the business saw exponential growth in ecommerce and a dramatic change in the mix of inventory. This has forced them to challenge and change multiple dimensions of their operating model. Seattle based Leah Monica, who leads the member support function for this amazing US\$150b business, will describe the most dramatic changes in her thirty-three years in the company. She will also cover some interesting lessons learnt in changing feedback mechanisms and their part outsourced model. This will be a unique chance to learn from one of America's most admired businesses with an NPS of 79.

Peter Walker, Assistant Commissioner, Enterprise Services and Technology, Australian Taxation Office:

Super, Keeper, Boost: the ATO's COVID Response

The ATO has taken on some massive challenges through the COVID pandemic. Moving 20,000 staff to at home work was challenging enough, but the ATO has also had to administer over \$50b in stimulus payments and handle contact volumes 30% higher than any prior peak using 2000 more staff. In this discussion, Peter Walker, our former CCOF member, will discuss some of the strategies the ATO used and what they have learnt in managing such a huge change for customers and staff. We think this represents one of the great success stories through the COVID crisis so join Peter for a discussion of change made at scale and in rapid time.

Lisa Pogonoski, General Manager, Customer Resolution, Westpac: Changing the Focus on Customers through Complaint Handling

When Lisa Pogonoski took over all complaint handling at Westpac, she saw it as a much bigger opportunity than handling complaints well. With Royal commissions and extra regulatory scrutiny, she saw the opportunity to drive broader customer improvements across the business. First, she had to earn credibility by handling complaints in a fair way. Then she started using the data and stories to drive change into many parts of the bank and to demonstrate the need for change and uncover more systemic issues. Join Lisa to see how you can really treat complaints as gold.

Nurturing Culture in a Virtual World: Steve Simpson, International Speaker and Author

Workplace cultures were important prior to the pandemic, but there is a sound argument that now they are even more vital in helping organisations sustain performance and workforce loyalty. As organisations have become more virtual, mechanisms to build and maintain culture have also evolved. In this session with Steve Simpson, you will be re-introduced to his concept of UGRs - unwritten ground rules - used by organisations across the world to understand and improve their cultures.

Steve will explore how the 'culture cues' have changed in a virtual context - those signs that we used to rely on to form our understanding of 'the way we do things around here'. This has implications for leaders in monitoring and nurturing culture. Steve will also explore four cultural attributes that have emerged as more important in virtual workplaces that ensure positive, productive and successful workplace cultures.

Closing Session

Embracing digital survival: the Fairfax story and its relevance today

In 2010 Greg Hywood took over as CEO of Fairfax recognising that they were already slow to respond waves of digital transformation that were challenging all news media. In the next eight years he managed Australia's most spectacular media transformation from an old print media business to a multi-media digital business that also prints newspapers. Greg will describe the strategies that worked and lessons that all companies can consider in embarking on radical change. It wasn't easy to cut staff numbers drastically, but Greg will show that the business could not have survived without these cuts and many other changes.

Guest Speaker Biographies

Jodie Fox is an author and an entrepreneur who may or may not make it. Jodie Fox was a co-founder and the creative director of Shoes of Prey.

A banking and finance lawyer by trade and a dedicated creative, Fox created a perfect nexus of the corporate and creative worlds when she co-founded Shoes of Prey.

Identifying and serving a gap in the market for custom-made shoes at non-luxury prices, Shoes of Prey was considered a global leader and innovator in mass-customisation and on-demand manufacturing. A fully vertically integrated business that raised over US\$27 million in funding, and with more than six million shoes designed, Shoes of Prey changed the way the retail industry thought about product and manufacturing. Shoes of Prey ceased trading in August 2018.

Now Jodie Fox is rebooting herself for her next venture.

In recognition of her work at Shoes of Prey, Fox was a judge at the World Retail Awards (2016, 2017, 2018) lectured the Stanford Graduate School of Business MBA Class (2016, 2017, 2018) and regularly keynotes events including the National Retail Federation conference (2017), Virgin Australia Melbourne Fashion Festival (alongside Renzo Rosso, Nicola Formichetti and Fern Mallis) and the American Apparel and Footwear Association Executive Summit (2016).

Accolades collected by Fox personally include:

Two Ten Women In Footwear Industry Impact Awards — Inaugural WIFI Influencer Award (2018)

listed as number 6 in the Top 50 Australian and New Zealand Women in Tech (2016)

Elle Magazine Style Awards — Fashion Innovator of the Year, Australia (2015)

Griffith University Business School Outstanding Alumni (2015)

Top 30 most influential women in Australian retail (2014)

Top 10 Australian female entrepreneurs (2014) finalist for the InStyle Audi Woman of Style Awards, Australia (2014)

Cosmopolitan Magazine's top 30 women (2013)

Telstra Businesswoman of the Year (Australia) — Private & Corporate Sector (2011)



Jodie Fox



Gregory Hywood

Gregory Hywood is a Walkley Award-winning reporter who went on to become the CEO and Managing Director of Fairfax Media in 2010.

Over eight years Hywood and his team dramatically turned the company's fortunes around, culminating in last year's successful merger with Nine.

Hywood is currently pursuing private interests.

Previous experience

Journalism: Hywood's career began as a business and industrial relations reporter on the Australian Financial Review. He later moved into political and economics reporting in Canberra, and global affairs, based in London and Washington.

After returning to Australia he became Publisher and Editor in Chief of the AFR, then The Sydney Morning Herald, then The Age.

Government: Hywood later joined the Victorian government becoming Executive Director of Policy and Cabinet in the Premier's department, and the CEO of Tourism Victoria.

Fairfax: Returning to Fairfax Media as a Director and later CEO, Hywood led the turnaround of Fairfax as it confronted plunging revenues and earnings in the wake of massive digital disruption.



Tim Bennett-Williams

Tim Bennett-Williams, Head of Service and Support, MYOB

A compelling leader with a unique blend of strategic and operational capability and experience. I thrive when driving change, leading teams and managing initiatives that deliver measurable improvement in customer experience and have done so across a variety of contact centre, operational and strategic project roles in large customer-based organisations.



Steve Simpson

Steve Simpson, International Speaker and Author

Steve Simpson has been invited as a keynote speaker at conferences around the world for his truly unique insights into corporate cultures and how to unleash the potential that lies within.

Whether it's creating a corporate culture to deliver great customer experiences, helping leaders understand their role in shaping the company culture, enabling teams to perform better, equipping people to revel in change initiatives, or getting people to take safety seriously, Steve reveals how his concept of UGRs® – unwritten ground rules – can be used to effect lasting, positive change.

Steve's insights are not based on theory. In addition to his conference presentations, he has worked in-house with a range of organisations on different continents over extended period of time. He knows the pitfalls, traps,

objections and issues that emerge when people are challenged to re-think the 'way we do things around here'.

Steve is the author of two books including 'UGRs: Cracking the Corporate Culture Code'. He is the co-author to a further three books, the latest being 'A Culture Turned'. He has a Master's Degree from the University of Alberta and was invited to undertake an Australian city lecture tour to co-present with Harvard University Professor Rosabeth Moss Kanter.

Steve has worked with organisations in countries including Australia and New Zealand, the UK, the US, the UAE, South Africa and various Asian countries. Professional Speakers Australia recognised Steve's achievements by awarding him the prestigious Australian Educator of the Year Award.

Genevieve McLean, Senior Manager, Customer Care Standards – Optus

My career and key achievements have centred on establishing and leading teams in the delivery of optimised customer and employee experience, capability, process, compliance, controls and call quality programmes directly within Telecommunications, Energy Retailers and Business Outsourcing partners for over 15 years. Underpinned by my qualifications in Quality Management Systems, Risk and Governance, Privacy, and Learning and Development. I have held Senior Leadership positions that have enabled me to deliver key programmes of work delivering significant value back to onshore and offshore organisations and business partners, providing services to a range of organisations across the Utilities, Banking & Finance, Telecommunications and Government sectors. I pride myself on being able to make positive change in organisations through my strong leadership and interpersonal skills that have enabled me to engage and influence stakeholders at all levels within organisations, coupled with my courage to challenge the norm and make hard decisions when required, centred on the best interests of the business, our people and the customer.



Genevieve McLean

Peter Walker, Assistant Commissioner, Enterprise Services and Technology, Australian Taxation Office

Peter Walker joined the ATO 10 years ago as Assistant Commissioner (AC) Customer Service Solutions.

Presently, Peter is AC IT Commercial Services (ITCS) in Enterprise Solutions Technology (EST).

Peter is responsible for the commercial management of ATO's IT operations, and financial management of ATO's outsource IT operations.

Prior to the ATO, Peter has a background in Management Consulting in Contact Centre/Service Delivery strategy and improvement, as well as being a former Senior Executive with Telstra.



Peter Walker

Peter has a passion for business improvement, new and innovative technology, and business strategy. He has a long history of applying these skills to improve a wide range of varied organisations.



Lisa Pogonoski

Lisa Pogonoski, General Manager, Customer Resolution, Westpac

Lisa is the General Manager, Customer Solutions at the Westpac Group, responsible for complaints handling across all brands. Lisa has been in her current role 2 years.

Previously Lisa worked in BT Financial Group for 25 years. Lisa was the Chief Customer Officer of BT Financial Group for 4 years, a role responsible for working with senior leaders to drive customer focus. Lisa and her team focus on building customer culture through training, embedding Our Service Promise and connecting people with customers; driving programs to improve the customer experience, including reducing complaints and ensuring we do the right thing by our customers by making customer focused decisions. In 2016 Lisa was also running the BT Marketing function.

Prior to this Lisa has held various roles including running the BT contact centre, managing customer service change programs & running key support teams such as training, process improvement, change management & customer experience functions. Most recently Lisa spent 3 years building Scalable Advice business in BT, a team of 90 people focused on helping customers with their insurance & superannuation needs over the phone. In 2015 Lisa was awarded the internal Westpac Women of Influence Award in the Customer category.



Leah Monica

Leah Monica, Assistant Vice President, Member Service Centres, Costco Wholesale

AVP Member Service Contact Centers.

Leah Monica started her career with Costco Wholesale in Lynwood, WA in 1987 as a seasonal employee pushing carts. Leah spent 13 years in various management positions in local warehouses. From 2000 to 2006 Leah spent time as Assistant Manager in the Costco Optical Distribution Center and Costco Wholesale Trading (CWT). In 2006, Leah moved to the Corporate Call Center as Director of Operations and in 2011 she was promoted to General Manager of our Corporate Member Service Centers, Membership Processing and Card Services. In 2018, Leah was promoted to AVP Member Service Centers.

Leah and her husband George are avid sports fans and along with their six children and six grandchildren are all natives of Seattle.