

Chief Financial Officer

Customer Experience Breakout Session
January 24, 2017



Executive Profile

Age: 52

Education: BS, CPA, MBA

Tenure: CFO (2 yrs); BU Controller (4 yrs)

Additional: Serves on 2 public Boards; married with 2 children

My View of Customer Experience:

How do I effectively include CX planning and measurements in our forecasts?
How do I prove the value of CX to the street?

Biography & Role

The CFO's responsibilities are to: manage cash flow, oversee financial planning, communicate financial results to the street, and analyze financial strengths and weaknesses and propose corrective actions.

You are a long-time friend of the CEO, having worked together previously and whom you followed to this company 8 years ago. Things have been going well, but the company is about to report quarterly earnings that will miss Wall St. expectations. You are obviously concerned and less at ease than usual.

You hold a BS in Biology and MBA from the Kellogg School of Management, as well as being a CPA. You prioritize your family and have a good work-life balance. You are also a well-respected member of the corporate financial community.

Key Priorities

- Liquidity
- Overall Profitability / Margins
- Efficiency of Capital

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My View of Customer Experience:

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Notes and Comments

Chief Marketing Officer

Customer Experience Breakout Session
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Executive Profile

Age: 45

Education: BA, MBA

Tenure: CMO (6 mo); BU VP (2 yrs)

Additional: Single; world traveler

My View of Customer Experience:

How do I create an organization that values CX?

How do I evaluate CX spending versus traditional marketing categories?

Biography & Role

The CMO's responsibilities are to: promote brands, make advertising effective, monitor and respond to shifts in buying behavior and be the "voice of the consumer."

You were recruited to the company to revive one of the company's lagging businesses after a distinguished career in advertising. Your success led to your recent promotion to the C-suite. The celebration is short-lived, however – it has come to your attention that one of your largest competitors is about to introduce a marketing blitz which will likely steal share from your leading brand.

You hold a BA in Music and are a passionate skier and surfer. Your independent and sometimes unconventional thinking often puts you at odds with the other executives.

Key Priorities

- Customer Satisfaction / Loyalty
- ROI on Marketing Spend
- Digital Effectiveness (SEO, Click-Thru & Impressions)

Chief Marketing Officer

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Executive Profile

Age: 45
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Tenure: CMO (6 mo); BU VP (2 yrs)
Additional: Single; world traveler

My View of Customer Experience:

How do I create an organization that values CX?
How do I evaluate CX spending versus traditional marketing categories?

Notes and Comments

Chief Operating Officer

Customer Experience Breakout Session
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Executive Profile

Age: 61

Education: BA, MBA

Tenure: COO (15 yrs)

Additional: Active volunteer; married with 3 children and 4 grandchildren

My View of Customer Experience:

How do I execute and adapt based on CX metrics?
How do I prioritize and sequence CX investments?

Biography & Role

The COO's responsibilities are to: oversee day-to-day business operations, create operations strategy, and align employees with corporate goals.

You have held the COO for 15 years, and previously served the same role in two smaller firms in the industry. You have presided over the company's ups and downs over the past several years. A major black eye for the company currently are declining on-time performance ratings – your airline is currently dead last among its competitors. The latest industry report on this key metric is set to be released later this week.

You hold a BA and MBA from Harvard Business School. You have steadily cut back your time in the office and tend to give your direct reports wide latitude to govern their respective divisions as they see fit.

Key Priorities

- Operating Performance & Incident Rate
- Operating Efficiency
- Maintenance / Failure Frequency & Cost

Chief Operating Officer

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Executive Profile

Age: 61

Education: BA, MBA

Tenure: COO (8 yrs)

Additional: Active volunteer; married with 3 children and 4 grandchildren

My View of Customer Experience:

How do I execute and adapt based on CX metrics?
How do I prioritize and sequence CX investments?

Notes and Comments

Chief Technology Officer

Customer Experience Breakout Session
January 24, 2017



Executive Profile

Age: 48

Education: BS, MS

Tenure: CTO (3 yrs); VP of R&D (8 yrs)

Additional: Loves dog and sports

My View of Customer Experience:

How do I build the technology enablers to support customer demands?

Biography & Role

The CTO's responsibilities are to: establish the technical vision and lead company's technological development, advise other departments on technologies that may improve their efficiency and effectiveness, and monitor technology and social trends that could impact the company.

You joined your current organization three years ago, after being VP of R&D at a prior company. You care deeply about building a talented, engaged, and motivated engineering force. However, after a difficult overhaul of the software used for ticket purchasing, you are wary of further sweeping technology changes.

You hold a BS in Computer Science and Engineering and an MS in Electrical Engineering and Computer Science, both from MIT.

Key Priorities

- IT Incident and Resolution Rate & Time
- Technology ROI
- Employee / Customer Satisfaction with Systems & Technology

Chief Technology Officer

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Executive Profile

Age: 48
Education: BS, MS
Tenure: CTO (3 yrs); VP of R&D (8 yrs)
Additional: Loves dog and sports

My View of Customer Experience:

How do I build the technology enablers to support customer demands?

Notes and Comments

Chief HR Officer

Customer Experience Breakout Session
January 24, 2017



Executive Profile

Age: 50

Education: BA, MA

Tenure: CFO (4 yrs), SVP, HR & Comms (2 yrs)

Additional: Married, no children

My View of Customer Experience:

How do I engage employees to best support our CX ambitions?
How do I create a culture of client-centricity?

Biography & Role

The CHRO's responsibilities are to: develop and execute HR strategy to support organization's business plan, specifically in the areas of succession planning, talent / performance management, change management, training, and compensation.

You have built a career at your company over the past 14 years, so by now you know the business inside-out. However, recently recruiting top talent has become a key challenge due to major skills shortages and changes in demographics.

You hold a BA in English from Penn State and an MA in English from ASU. You actively seek to discover and publish insights into building successful corporate talent practices, and you've been externally recognized for HR excellence.

Key Priorities

- Employee Satisfaction / Retention
- Recruiting Investment (Cost and Time per Candidate)
- Training & Development Engagement Rates

Chief HR Officer

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Executive Profile

Age: 50

Education: BA, MA

Tenure: CFO (4 yrs), SVP, HR & Comms (2 yrs)

Additional: Married, no children

My View of Customer Experience:

How do I engage employees to best support our CX ambitions?
How do I create a culture of client-centricity?

Notes and Comments