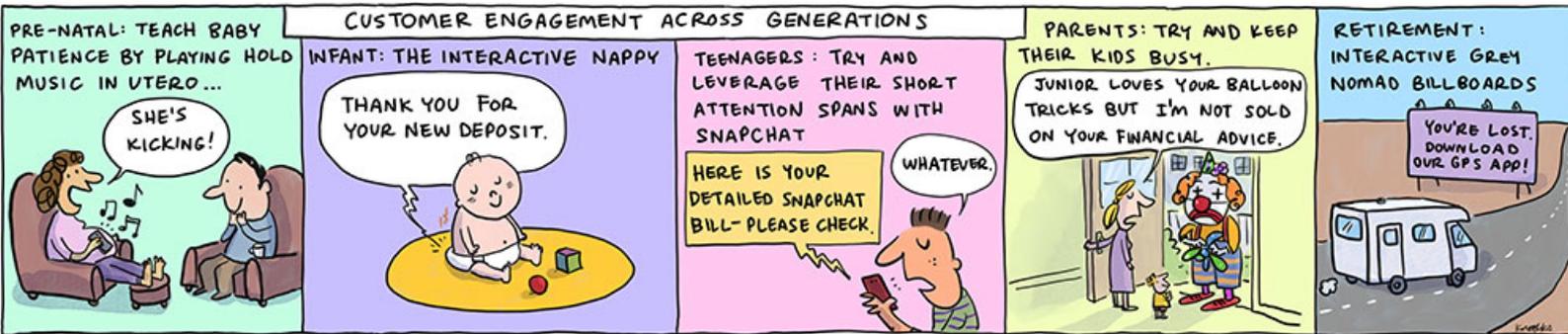


Chief Customer Officer Forum

Virtual CCOF
13 & 14 October 2021



Chief Customer Officer Forum

Differentiated Customer Experiences



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Welcome from the CCO Forum Committee



Welcome to our 3rd “Virtual” Chief Customer Officer Forum (CCOF). We’ve taken onboard your feedback from our previous two virtual meetings so we hope this will work even better, with a slightly different line-up. Today we’ll have three Keynote presentations and one round of case studies. We hope this will provide a great mix of strategic thinking and practical, hands-on advice. The theme for the Forum is, **Differentiated Customer Experiences**, and we’re very pleased with the mix of industries and organisation types represented.



We hope that we will be able to proceed with dinners in three locations, Brisbane, Sydney and Melbourne (apologies to our Hobart and Adelaide members) though we have plans for you too! We tried to construct a meeting “doable” from anywhere with “no effort” so food should get to you.



Our Opening Keynote speaker is, **Ann Sherry, AO, board member for NAB, Sydney Airport, Unicef and Enero and former CEO, Carnival Australia**. In Ann’s topic, **Rethinking Customer Experience a more Challenging Idea**, she will share some of the things she has learnt about how to treat different demographics and the role technology is playing. This should be a great discussion with one of the most respected leaders in Australian business. Our 2nd Keynote speaker is, **Mark Fitzgibbon, Managing Director/Chief Executive Officer nib**, who will offer a current CEO perspective. Mark is among Australia’s longest serving CEOs so has much success to draw on. We’ll close the day with **Stephen Scheeler, currently CEO @Omniscient and former CEO Facebook, Australia & New Zealand**, Stephen will share his some of leadership and management lessons that he had to rethink and adapt while at Facebook and if time permits some of his thinking of data ethics.



In our featured cases we have a diverse range of experience. In 2017 Craig Tiley, of Tennis Australia shared some of their success. To get deeper into the thinking behind Australia’s leading sports experience, we are fortunate to have **Karen Clydesdale, Head of Customer Experience and Customer Relationship Management, Tennis Australia**, presenting her topic, **Enabling Tennis to make customer led decisions**.



Harriet Wakelam, Executive Manager Customer Behaviour and Design, IAG, will tell the story of how IAG are creating a Customer Experience architecture and she will describe what that means. **Martin Smithson, General Manager, Merchandise Strategy and Transformation, Coles**, is presenting on **Lessons and stories in creating Accessible experiences at Coles**.

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, Lisa Pogonoski, Samantha Bartlett, Chris Jackson and David Jaffe

Agenda

Wednesday 13 October Brisbane Dinner

Sake Restaurant and Bar

6:00pm – 6:30pm Drinks

6:30pm - 9:30pm Dinner

Thursday 14 October - Virtual

- 8:30am Zoom opens. People arrive with coffee, chat and settle in.
- 8:45am Welcome and Introductions
- 9:00am Opening Keynote: Ann Sherry, board member for NAB, Sydney Airport, Unicef and Enero and former CEO, Carnival Australia
- 10:00am Coffee Recharge Break
- 10:15am Case Study Session
- 11:15am Morning Tea
- 11:30am Current CEO Perspective – Keynote Mark Fitzgibbon, MD, nib
- 12:30pm Lunch/Opt in Networking
- 1:15pm Closing Keynote: Stephen Scheeler, former CEO Facebook,
- 2:15 pm What we Learnt Today and Close
- 2:30pm Meeting Close
- 2:30pm Welcome to stay on for informal discussions

Opening Keynote

Ann Sherry, Board member for NAB, Sydney Airport, Unicef and Enero and former CEO, Carnival Australia: Rethinking Customer Experience a More Challenging Idea

Ann Sherry has run businesses such as Carnival that have offered, consciously diversified customer experiences. She now sits on multiple boards such as Sydney airport, Unicef and nab, where she chairs the customer committee. Each of these organisations has very different thinking on what customers are looking for and how to address these needs. She'll share some of the things she has learnt about how to treat different demographics and the role technology is playing. She'll also share how Human Centred Design is making a difference even in areas like problem remediation. This should be a great discussion with one of the most respected leaders in Australian business.

Breakout Sessions

Karen Clydesdale, Head of Customer Experience and Customer Relationship Management, Tennis Australia: Enabling Tennis to make Customer Led Decisions

Four years ago, Craig Tiley, CEO of Tennis Australia described the successful journey of the Australian Open with it's three customer groups of players, fans and patrons. Since 2017 Karen Clydesdale has been helping Tennis become customer led in all aspects of the business. Human Centred Design now plays a role in how different aspects of the events and tennis experiences are designed and delivered. She will also reflect on where the CX team invest their time and how this way of thinking has become almost more important through COVID. She will share the customer first/insight driven focus and other CX principles in creating a customer centric culture.



Martin Smithson, General Manager, Merchandise Strategy and Transformation: Lessons and stories in creating Accessible experiences at Coles

High Level Overview The value of disability inclusion and commitment from business is gaining global momentum, and Coles are on the front foot of building accessible and inclusive customer experiences. Coles recognises the importance of Accessibility and how it is essential in their mission to be 'Australia's most trusted retailer'. In this case study that covers stores, digital applications and product design, GM of Accessibility, Martin Smithson will share how Coles has created solutions that have reshaped experiences for customers and team members. Creating a truly Accessible experience is a journey, and Coles has learnt that putting customers and team members at the heart of the solution is the key to creating long-term, sustainable answers. He will share how this is an omni channel experience problem, with only benefits for Coles, their customers and teams. This should be a fascinating discussion of an important area of differentiated design.

Harriet Wakelam, Executive Manager Customer Behaviour and Design, IAG: Designing for risk: the impact of design thinking on products at IAG

Human centred design and behaviour science are placing an increasing role in product and process design at IAG. Harriet Wakelam leads a pool of experts who are changing the way IAG think about customers and their interaction. She will share examples of the impact this has had on product design. However, it hasn't all been smooth sailing and Harriet's teams have had to work out where they fit in the business and the role they play with established functions like marketing. They have also worked on creating a Customer Experience architecture and she will describe what that means.

Current CEO Perspective

Mark Fitzgibbon, Managing Director and CEO nib nib CEO Mark Fitzgibbon's perspective on the customer experience and the next evolution

Mark Fitzgibbon is one of Australia's longest serving CEOs approaching twenty years as CEO of nib Group (nib). He has led the business from its origins as small regional health fund to become an ASX-listed business that has experienced membership growth that's consistently above the industry. In this discussion Mark will cover why he sees the customer experience as important and where he ranks it with other priorities. He'll describe the model he uses to hold executives accountable for the customer experiences they deliver as well as what he measures and takes note of. He'll also talk about the change in channels and channel use he has observed and where he sees that going next. This will be a great opportunity to hear from one of Australia's most successful CEOs.

Closing Session

Stephen Scheeler, CEO @Omniscient and former CEO Facebook, Australia & New Zealand: How the oldest guy at Facebook had to relearn management and ethics

Stephen Scheeler was Facebook's oldest recruit, a core member of the leadership team, and head of its #5 market globally (ANZ). However, Stephen found that the management practices at Facebook forced him to revisit almost every aspect of the way he led and managed. He has boiled this down to the eight key elements of leadership that have applicability in any business and are essential in today's disruption driven economies. He will also reflect on the maturity of Australia's digital leadership, our vulnerability to disruption, and the changing ethical landscape of data and AI.

Guest Speaker Biographies

Ann Sherry, AO Board member for NAB, Sydney Airport, Unicef and Enero and former CEO, Carnival Australia

Ann is one of Australia's leading business executives with a career that spans Government, Banking and Cruise Tourism.

Ann is the Chair of UNICEF Australia and Enero Group and currently holds non-executive roles with National Australia Bank, Sydney Airport, Infrastructure Victoria, Cape York Partnerships, Museum of Contemporary Art Australia and the Australia and New Zealand School of Government (ANZSOG). Ann is the Australian Co-Chair of the Australia New Zealand Leadership Forum.

She is an Adviser, the former Chairman and was Chief Executive Officer of Carnival Australia for a decade. Carnival Australia is the largest cruise ship operator in the Australia/Pacific region.

Beginning working life as a Radiographer, Ann became First Assistant Secretary of the Office of the Status of Women in Canberra before moving to the banking sector initially in HR roles, then in CEO roles with Westpac NZ and the Bank of Melbourne.

The Australian Government awarded Ann the Centenary Medal in 2001 and in 2004 she was awarded an Order of Australia. In 2015, Ann was named as the overall winner of the Australian Financial Review 100 Women of Influence Award.

Ann devotes considerable energy to her passion for women's rights (currently as convenor of the Champions of Change Coalition), supporting opportunity for Indigenous communities, personal philanthropy and support of the arts.

Mark Fitzgibbon, Managing Director/Chief Executive Officer nib

Mark Fitzgibbon leads ASX-Listed private health insurer, nib, as Chief Executive Officer and Managing Director.

Since joining the team in 2002, Mark has guided the national and international expansion of the nib Group. In 2007 he led nib through its demutualisation and listing on the ASX.

From its mutual beginnings in the Hunter more than 65 years ago, today the nib Group is Australia's fourth largest health insurer providing health and medical insurance to over 1.6 million Australian and New Zealand residents and supports the health insurance needs of more than 190,000 international students and workers in Australia. In addition, nib Travel is Australia's third



Ann Sherry



Mark Fitzgibbon

largest travel insurer and global distributor of travel insurance. In financial year 2020, the company generated A\$2.5 billion in premium revenue and currently has a market capitalisation of approximately A\$2.64 billion.

He holds a Masters in Business Administration (UTS) and Masters in Arts (MGSM) and is a fellow of the Australian Institute of Company Directors.



Stephen Scheeler

Stephen Scheeler, currently CEO @Omniscient and former CEO Facebook, Australia & New Zealand

The world has gone digital, but Australian business risk falling behind. As advisor, mentor and speaker, Stephen Scheeler partners with Australia's business leaders to help them master digital strategy, culture & leadership, and build innovative, global, billion-dollar businesses. As a speaker, Stephen has a unique ability to excite audiences on the power of technology, the future of business and the new paradigm of 21st-century leadership. He is an inspiring personality on the highest-profile stages – including TEDx, the Australian Governance Summit and AMP Amplify – and is a member of the Prime Minister's Knowledge Nation 100, top innovation leaders in Australia. Current work Stephen is the founder of global advisory The Digital CEO, Senior Advisor to McKinsey & Company, and Executive-in-Residence at Asia-Pacific's leading business school, the Australian Graduate School of Management – he partners with the senior leaders of some of the world's leading companies to help them build world-beating strategies, capabilities, culture and leadership, including Qantas, nab, Westpac, Macquarie Bank, ANZ Bank, Commonwealth Bank, IAG, Suncorp, Telstra, Wesfarmers, AMP, CUB, Brambles, Google, DellEMC, Lenovo, Seven West Media, MCN, QBE, Hollard, BAT, JB Hi-Fi, Bunnings, Flight Centre, Mirvac and the Australian Government.

Previous experience

Facebook: Stephen is the former Facebook CEO for Australia and New Zealand, where he guided Facebook's unprecedented rise from quirky Silicon Valley start up to media and technology titan.

Working with Mark Zuckerberg, Sheryl Sandberg and Facebook's Silicon Valley leaders, his tenure at Facebook saw the Australia and New Zealand business – including Instagram, Messenger, Whatsapp and Oculus – grow to become one of the most successful Facebook markets in the world.

Employment: Stephen is a seasoned business leader, with a career spanning over 25 years across consumer products, retail, ecommerce, automotive, financial services, media and technology. He has served in senior executive roles at global leaders Westfield and Inchcape, and at Australian consumer products giant, Lion.

Karen Clydesdale, Head of Customer Experience and Customer Relationship Management, Tennis Australia

Working collaboratively enterprise-wide to develop and activate Tennis Australia's Customer Experience strategy and develop a customer centric culture. Support Events and Tennis teams through Human Centred Design practise to enable customer led decision making. Developing personalised and relevant experiences through roll-out of Customer Relationship Management.

Passionate about creating a customer first/data driven culture to create iconic experiences (physical & digital). Enabling teams to be customer led through Human Centred Design (HCD), design thinking as a new way of working to inform new or existing products and event experiences. Embrace the 'Art of the Possible' mindset and advocating for agile ways of working. Provide Customer Service that is global best practice, underpinned by excellent workforce training.



Karen Clydesdale

Martin Smithson, General Manager Merchandise Strategy and Transformation at Coles

Currently the General Manager for Business Unit Strategy and Transformation at Coles, in addition to General Manager sponsor for Accessibility. Martin has spent 10 years at Coles Group in a variety of roles across Commercial, Strategy and Finance, including Head of Finance for Coles Liquor.

Prior to Coles, Martin spent two years at Asda in the UK and four years before that at Tata Steel. A graduate of the University of Manchester and Sheffield Hallam University.



Martin Smithson

Harriet Wakelam, Executive Manager Customer Behaviour and Design, IAG

I use design practices to transform and deliver on improved Customer experiences, at IAG this means supporting the design of experiences, products and services that bring to life our purpose of a safer Australia. I lead a multi-disciplinary team across innovation, product, futures strategy and customer experience design. I am drawn to 'why' and know that CX is far beyond interviewing customers. I understand the business and customer drivers of experience and deliver measurable change. I like to make things real and make real things, inspiring curiosity and generate new meaning. My current interests lie in the development of future practice - where design intersects with strategy and customer experience.



Harriet Wakelam



My daily work spans the measurable improvement of insurance products and services, through to the emerging risks posed by climate change and the emergence of new forms of mobility. I've worked in finance, insurance and health as well as mentoring start-ups. I'm an active supporter of the UK and Australian FinTech and social enterprise communities. I've worked in US, UK, Russia and Eastern Europe.

As a leader I operate decisively in ambiguity, combine information in new ways and surface original thoughts both within the teams I develop and across the programs of work I enable. I am a connector and work best in complex systems. Creating the conditions in which people can thrive, challenge, and grow gets me out of bed in the morning. I'm originally a Londoner currently living in Melbourne. My great loves include 2 almost grown humans, the random collision of ideas, brave people, courage and mischief (supported by the odd chocolate and martini)