



**HDI Leadership Forum Events**  
**Dates:** September 17-20, 2018  
**Location:** The Wigwam | Litchfield Park, AZ  
**Group:** Executive Forum  
**Facilitator:** Leslie Cook

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**Monday**

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7:00 pm – 8:30 pm	<b>Welcome Reception</b> – All Forum participants are encouraged to attend this social activity. There will be appetizers and drinks available.
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**Tuesday**

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7:45 am – 8:30 am	<b>Breakfast</b>
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8:30 am – 9:00 am	<b>HDI Welcome</b> Presenter: Allyson Rollins
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9:00 am – 10:00 am	<b>Executive Forum Group Welcome and Introductions</b> <b>Facilitator: Leslie Cook</b> This is an opportunity to share your expectations for this meeting, identifying key items or topics that you want to take-away from this meeting. In advance, please give some thought to the following questions: <ul style="list-style-type: none"><li>• What do YOU want to get out of this Leadership Forum meeting?</li><li>• What is your primary objective for this meeting?</li></ul>
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10:00 am – 11:00 am	<b>Part 1 – Using Data &amp; Analytics for Decision Making within the Service Desk Environment: Show &amp; Tell</b> <b>Presenters: To Be Confirmed</b> <ul style="list-style-type: none"><li>• Two Participants from the Executive Forum will share what they do with data analytics within their organizations.<ul style="list-style-type: none"><li>○ What data do they collect? ○ Once the data is gathered, what are they doing with their data?</li><li>○ How are they using their data to make business decisions?</li></ul></li><li>• <b>Example Focus:</b> Infrastructure teams have a lot of monitoring tools – how do we effectively get that data out in front of their support/service desk, so when calls come in they can be educated about how the data effects/impacts the service desk?</li></ul>
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- **Data Analytics Defined by the Executive Forum Group:**
  - Data is what we extract from the tools and use to dive into what is driving performance.
  - Data is the “content” and analytics is the “why” we make business decisions.

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11:00 am – 12:00 pm

**Part 2 – Using Data & Analytics for Decision Making within the Service Desk Environment: Roundtable Discussion**

**Facilitator: Leslie Cook**

**Questions to discuss during roundtable discussion:**

- Why are you collecting the data?
- Once you have the data, what do you do with the data?
- What are the actions you take with the data to make improvements within your organization?
- How do you show the actions of: saving, moving, improving quality, etc.?
- Example: Workforce Management Tools – tools that can listen into calls for behavior. What is your action plan to start this project and how do you best use the data/analytics from this type of tool to improve business operations, i.e. saving money, improving quality, creating efficiencies, etc.?
- What sources of data should you be mining? Knowledge articles?
- What are the best tools for analytics? Microsoft SQL?
- Predictive analytics for IT break-fix “stuff” – share examples of that and tools to prevent incidents. Examples: Set a baseline for a specific device to get alerts well before there is a problem, scheduling trends

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12:00 pm – 1:00 pm

**Lunch**

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1:00 pm – 2:00 pm

**Saving Costs and Creating Efficiencies within Your Organization: Solve My Problem**

**Facilitator: Leslie Cook**

This is a Solve My Problem Session. The group will take 10 minutes for each question and 30 minutes to summarize and debrief the group

- What are things you are doing within your organization to save costs and create efficiency?
- What are (or were) you doing repeatedly that could be (or has been) automated that could save you time, money, resources, etc.?
- Has anyone utilized the assistance of a vendor to help create more cost-effective measures within your organization?

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2:00 pm – 2:15 pm

**Break**

2:15 pm – 3:45 pm	<b>The Strategic Value of the Service Desk: Group Brainstorming</b> <b>Facilitator: Leslie Cook</b> This session has a goal of answering the below questions through group brainstorming. Participants will split into groups to discuss each question and document their answers to share and discuss with the entire group. After the meeting, we will combine all documentation from this session and share with the group. <ul style="list-style-type: none"><li>• How can the service desk change the view within the organization from being an operational cost center to a strategic team?</li><li>• Including, but not limited to problem management, project support and stability statistics/reporting, how can they be leveraged to become a strategic arm of the organization?</li><li>• How can executive team members communicate their operational and strategic value to the c-levels within their business?</li></ul>
3:45 pm – 4:00 pm	<b>Break</b>
4:00 pm – 5:00 pm	<b>Open Discussion / Parking Lot / Walk and Talk</b> <b>Facilitated by: Leslie Cook</b> This is an opportunity for open discussion regarding challenges faced, successes experienced, tools, RFPs, vendors, etc. Take this time to ask questions of your peers, share ideas or generate topics that are not mentioned on the agenda. What are some current issues you are facing that you would like to discuss? Use your post-it notes to capture your thoughts throughout the day not pertaining to the agenda items. Utilizing the parking lot area in the meeting room, stick your topic, idea or question in the designated area to be discussed at this time during the day.
5:00 pm – 6:30 pm	<b>Free Time</b>
6:30 pm – 8:30 pm	<b>Group Dinner</b>
<b>Wednesday</b>	
7:45 am – 8:30 am	<b>Breakfast</b>
8:30 am – 10:00 am	<b>Reorganization: Case Study</b> <b>Presenter: Tara Pound, Erie Insurance</b>



In April 2018, Tara shared with the group Erie's decision to undergo a restructure / reorganization. Tara will walk us through this transition and

how it impacted her department.

- Tara will share process for implementing the re-org/restructure
- What was the expected outcome? Was this achieved?
- What worked well? What did not?
- How did it effect the culture?
- What were the lessons learned?

10:00 am – 10:15 am **Break**

10:15 am – 12:00 pm **Change Navigation/ Organizational Change Management: Case Study**  
**Presenter: To Be Confirmed**

This case study will review the methodologies and processes used by one organization to roll out and implement a major change throughout the company. Regardless of the tool or change being implemented the method and process can remain the same.

- How do you make the change to self-service as it relates to Change Navigation/ Organization Change Management?
- How do you make the change to any bigger tool sets for the population of your organization as it relates to Change Navigation/ Organizational Change Management?
- Examples: Office 365, Windows 10, Skype, Hiring Process

12:00 pm – 1:00 pm **Lunch**

1:00 pm – 2:00 pm **Final Parking Lot Items, The One Thing: Roundtable, and Wrap-up**  
**Facilitator: Leslie Cook Session Description:**

- Go through any final parking lot discussion topics
- Discuss the one thing you will take away - What is one thing that you will take away from this Executive Forum meeting that you will work to improve or implement back at your organization?
- Does this one thing match one of your objectives that you identified on Day 1?

2:00 pm – 2:15 pm **Break**

2:15 pm – 5:00 pm **Site Tour**



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5:00 pm – 5:30 pm

**Free Time**

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5:30 pm – 7:00 pm

**Networking Reception**