



2018 HDI Leadership Forum Events
Dates: September 17 -20
Location: The Wigwam | Litchfield Park, AZ
Group: Retail Forum Group
Facilitator: Amy Eisenberg

Monday

7:00 pm – 8:30 pm **Networking Reception** – all Forum participants are encouraged to attend this social activity. There will be appetizers and drinks available.

Tuesday

7:45 am – 8:30 am **Breakfast**

8:30 am – 9:00 am **HDI Welcome**
Presenter: Allyson Rollins

9:00 am – 10:00 am **Retail Forum Group Welcome and Introductions**
Facilitator: Amy Eisenberg
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:

- What do YOU want to get out of this Leadership Forum meeting?
- What is your primary objective for this meeting?

This is also an opportunity to get to know each other, sharing your organization's recent challenges and successes with the group.

10:00 am – 10:15 am **Break**

10:15 am – 11:30 am **Customer Satisfaction Surveys: Show and Tell**
Facilitator: Amy Eisenberg
Come prepared to share your customer satisfaction survey strategy. What questions do you ask? What data are you measuring and why? How often do you survey your customers?

11:30 am – 12:00 pm **Roundtable Discussion: New Tools, Favorite Tools**
Facilitator: Amy Eisenberg

Come prepared to talk about your favorite tool or a new tool you've recently implemented. We'll compile a list for everyone and share this on HDIConnect.

12:00 pm – 1:00 pm **Lunch**

1:00 pm – 3:30 pm **Interactive Workshop: Metrics to Show the Business Value**

Presenter: Doug Tedder

Doug will cover how to show the business value of support for reporting up. How can you use the numbers beyond the normal reporting? What other ways of reporting? How to identify areas for improvement and report on that. Find pain points, repeat offenders.

- *Break when convenient*
-

3:30 pm – 4:30 pm **Roundtable Discussion: Ticketing Systems Techniques and Tips**

Facilitator: Amy Eisenberg

Share your best practices about your ticketing system. What do you like best about your system and how you have it set up? What do you like least about the system or how you have it set up? What would you change if you could?

4:30 pm – 5:00 pm **Facilitated Open Discussion / Parking Lot / Future Topics**

Facilitator: Amy Eisenberg

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 **Free Time**

6:30 pm – 8:30 pm **Group Dinner**

Wednesday

7:45 am – 8:30 am **Breakfast**

8:30 am – 11:00 am **Problem Management: SME Workshop**

Presenter: To Be Confirmed

What is the methodology, what is best? 5 Whys, Waterfall, root cause analysis, ITSM and PM, tips for RCA, how do you determine how long to spend on a problem before you move on? Timelines when it comes to PM, what is worth it?

- *Break when convenient*

11:00 am – 12:00 pm **Show and Tell: Escalation Process**

Facilitator: Amy Eisenberg

Share your process for escalations. Share definitions, what gets escalated. How do you coordinate between tier 1 and 2. What is your communication and business process? How do you communicate between tiers and with the customer?

12:00 pm – 1:00 pm **Lunch**

1:00 pm – 2:30 pm **Delivering Excellent Customer Experience in Desktop Support**

Presenter: Roy Atkinson

In this interactive presentation, we'll examine:

- What is customer experience (CX), and how does it differ from customer service?
- Why does CX matter to the service and support organization?
- What are some consequences of improving CX in an IT organization?
- What does CX look like from the point of view of desktop support?
- How can desktop support help improve CX?
- How can CX be measured and tracked for improvement?

2:30 pm – 2:45 pm **Break**

2:45 pm – 5:00 pm **Site Tour**

5:00 pm – 5:30 pm **Free Time**

5:30 pm – 7:00 pm **Group Networking Reception**

Thursday

7:45 am – 8:30 am **Breakfast**

8:30 am – 9:30 am **Employee Onboarding: Case Study**
Presenter: To Be Confirmed
When you hire a new employee, what does their first day look like?
What is the perception about the company, the culture, employee engagement, friendliness, collaboration, team environment etc...

9:30 am – 10:00 am **Department Road Map: Show and Tell**
Facilitator: Amy Eisenberg
What does your department roadmap look like over the next 12 months? What are the goals set for 2019? How are you going to get there? How did you determine the specific goals?

10:00 am – 10:15 am **Break**

10:15 am – 11:30 am **The One Thing and Future Topics: Roundtable Discussion**
Facilitator: Amy Eisenberg
Future Meeting Topics this is an opportunity to share your expectations and topic ideas/session formats/speaker suggestions for this meeting, identifying key items or topics for concentrated discussion for future meetings. In advance, please give some thought to the following questions:

- What are the topics that you would be disappointed if we did not discuss during a future forum meeting?
- Of the potential topics you identify, which ones would yield the greatest return to you and your organization for a future meeting?

The One Thing, what is one thing that you will take away from this 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?

11:30 am – 12:00 pm **Leadership Forum Closing**
Facilitated by: Allyson Rollins

