



**2018 HDI Leadership Forum Events**

**Dates:** September 17 -20

**Location:** The Wigwam | Litchfield Park, AZ

**Group:** Service and Support Leadership Forum Group

**Facilitator:** Tom Lewis

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**Monday**

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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.

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**Tuesday**

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7:45 am – 8:30 am     **Breakfast**

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

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9:00 am – 10:30 am     **Service and Support Center Leadership Forum Group Welcome and Introductions**  
**Facilitator: Tom Lewis**  
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. What has been a major accomplishment for you this year?

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10:30 am – 10:45 am     **Break**

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10:15 am – 11:30 am     **Customer Satisfaction Surveys: Show and Tell**  
**Facilitator: Tom Lewis**  
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?

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11:30 am – 12:00 pm    **Roundtable Discussion: New Tools, Favorite Tools**  
**Facilitator: Tom Lewis**  
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.

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12:00 pm – 1:00 pm    **Lunch**

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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*

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3:30 pm – 4:30 pm    **Your Business-Critical Metrics and KPIs: Show and Tell**  
**Facilitator: Tom Lewis**  
What is important to your business partners and stakeholders?

- Share examples of how numbers impact your business
- What are the common pieces of information that hold meaning?
- How do you present the data?

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4:30 pm – 5:00 pm    **Facilitated Open Discussion and Parking Lot**  
**Facilitator: Tom Lewis**  
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.

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5:00 pm – 6:30 pm    **Free Time**

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6:30 pm – 8:30 pm    **Group Dinner**

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**Wednesday**

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7:45 am – 8:30 am     **Breakfast**

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8:30 am – 9:45 am     **Knowledge Articles for Internal vs. External Use: Workshop**  
**Facilitator: Tom Lewis**  
This session will be a workshop compiled of group activities. You will walk away with a better understanding of how to write and document the articles properly.  
Some of the questions we will address during this session are:

- Do you have different rules for the two types of articles?
- Do you have different editors?
- How do you store them?
- How the external articles are made available?

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9:45 am – 10:00 am     **Break**

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10:00 am – 11:30 am     **Artificial Intelligence: Case Study**  
**Presenter: To Be Confirmed**  
We will have an individual share their AI journey and implementation story. This session will not be theory, the focus will be on the tools selected and why? What was the cost and time to implement AI? What type of savings has AI provided? Has AI decreased or increased head count? How has it impacted the customer experience?

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11:30 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?

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12:00 pm – 1:00 pm     **Lunch**

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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?

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- 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?

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2:30 pm – 2:45 pm    **Break**

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2:45 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    **Group Networking Reception**

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**Thursday**

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7:45 am – 8:30 am    **Breakfast**

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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...

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9:30 am – 10:00 am    **Department Road Map: Show and Tell**  
**Facilitator: Tom Lewis**  
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?

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10:00 am – 10:15 am    **Break**

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10:15 am – 11:30 am    **The One Thing and Future Topics: Roundtable Discussion**  
**Facilitator: Tom Lewis**  
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?

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- 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?

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

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