



2018 HDI Leadership Forum Event

Dates: June 11-13, 2018

Location: One Ocean Resort | Atlantic Beach, FL

Group: Executive Forum

Facilitator: Leslie Cook | Cell: 719-203-8650 | Leslie.Cook@UBM.com

Monday – June 11

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 – June 12

7:45 am – 8:30 am **Breakfast**

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

9:00 am – 10:00 am **Executive Forum Group Welcome and Introductions**
Facilitator: Leslie Cook
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?**

10:00 am – 10:15 am **Break/Transition to Next Session**

10:15 am – 12:00 pm **Our AI Journey with Amelia** *(Case Study)*
Presenter: Karyn Okon, Director – Allstate
Session Description:

- **Allstate’s Amelia Journey – how we got to where we are today!**
- **Interactive case study presentation to include Q&A and open discussion**
- **Proposed: If time allows, we could also take time to build a road map on first steps to take to prepare your organization for an AI implementation**

12:00 pm – 1:00 pm **Lunch**

1:00 pm – 4:30 pm Change Navigation (Organizational Change Management) (SME)

Presenter: TBD (SME) Companies Allstate evaluated in their RFP on OCM that are potential speakers on this topic:

- KPMG
- 71& Change
- Daugherty
- PWC

Session Description: How do you prepare your organization for change such as AI – not how to implement the code, but how to prepare for doing work entirely different? Session to include a facilitated discussion around the OCM challenges defined by the EXF group in April 2018

Level Setting: Change Navigation (or Organizational Change Management) vs. Change Management (ITIL). While people often use the terms Change Management and Change Navigation interchangeably, we will focus on utilizing Change Navigation in this session, which is used to describe the people change.

- **What is Change Navigation (or Organizational Change Management)?**
 - **Change navigation is a holistic, proactive, and structured approach to transitioning individuals, teams and organizations from a current state to a desired future state.**
 - **Change navigation is the application of a pre-defined framework and set of tools for leading the people side of change to achieve a desired outcome.**
 - **Change navigation emphasizes the people side of change and targets leadership and all impacted stakeholders across the organization (including executives, senior leaders, middle managers and line supervisors)**
- **What is Change Management (ITIL)?**
 - **According to HDI, (1) the process responsible for controlling the lifecycle of all changes. The primary objective of change management is to enable beneficial change with minimum disruption to IT services. A defined change management process minimizes interference and irregularity in customer service levels related to the implementation of alterations in business facilities, equipment, or processes. (2) Change management is the process of developing a planned approach to change in an organization that facilitates the adoption of changes**

in the business and/or employee environment (organizational change).

- According to Prosci (www.prosci.com), Change management is the discipline that guides how we prepare, equip and support individuals to successfully adopt change in order to drive organizational success and outcomes.
- According to one of our EXF members: Change Management as the physical implementation of technical code.

Challenges from April 2018 Include:

- Leslie to insert challenges from groups 1, 2, and 3 from April here!

4:30 pm – 5:00 pm **Facilitated Open Discussion / Parking Lot /Prep for Walk & Talk**
Facilitated by: Leslie Cook

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 – 5:30 pm **Walk & Talk**

Session Description:

- **During the Facilitated Open Discussion/Parking Lot Session we will identify a list of hot topics!**
- **The group will then select which hot topic they want to spend some time discussion**
- **This will work best in groups of 2 to 3 people in order to best hear each other during your “walk & talk”**
- **If we find that 6 people want to discuss the same topic, we will have two groups for that one topic**
- **Take a 30 minute walk and discuss this topic of your choosing**
- **If you can help it, don’t sit by your walk & talk group during dinner. During dinner, share your discussions from your walk & talk with others sitting at your table. This will be a way for more people to benefit from your learnings during the walk & talk!**

5:30 pm – 6:30 pm **Free Time**

6:30 pm – 8:30 pm **Group Dinner**

Wednesday – June 13

7:45 am – 8:30 am **Breakfast**

8:30 am – 9:15 am **Group Workshop / Session/ Activity**
Facilitated by: Allyson Rollins or SME

This will consist of circuit discussions, SME Workshop or another group activity.

9:30 am – 10:45 am **Google’s Strategy for Artificial Intelligence (AI):** *(SME from Google)*
Presenter: Google TBD

Session Description: Google to provide an overview of their strategy for AI, including:

- **Adoption**
- **How Googles strategy for AI relates to Organizational Change Management/Change Navigation (see session from Tuesday)**
- **Their opinion on a company that started with AI as a foundation to their business (Google) vs companies that have been in existence for a long time implementing AI – what should be considerations**
- **AI in Infrastructure**
- **What is out there for AI besides Amelia/Watson? What do they see is on the horizon for AI?**
- **AI for monitoring/alerts/ticket creation**
- **What are other AI uses?**
- **Social media as AI input for the service desk, retargeting a customer online to map where they have been before they call the service desk and being prepared for the call before they call**
- **How can we use AI to do reporting?**
- **Could an AI tool that uses natural language selection be used?**

What they do not want for this sessino: They don't want to discuss this topic generically

10:45 am – 11:00
am

Break/Transition to Next Session

11:00 am – 12:00
pm

Data and Analytics on Calls, Text and Data Mining: (Case Study)

Presenter: Karyn Okon has someone on her team that she could bring to present on this topic!

Session Description:

- **Description TBD**
- **We need to capture session summary from Karyn/her speaker and get input from steering committee on summary**

12:00 pm – 1:00 pm

Lunch

1:00 pm – 2:00 pm

Future Meeting Topic Discussion – September 2018 & 2019

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 an Executive Forum meeting in the future?**
- **Of the potential topics you identify, which ones would yield the greatest return to you and your organization for a future meeting?**

2:00 pm – 2:30 pm

The One Thing: (Roundtable.)

Facilitator: Leslie Cook

Session Description:

- **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?**

2:30 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 Reception