WISCONSIN CUSTOMER EXPERIENCE SYMPOSIUM

RESOURCE PACKET

MARCH 10, 2026

Wisconsin CX Symposium

Hosted By:

UWEBC



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CCMC customer care measurement & consulting

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TODAY'S AGENDA

08:30 AM	Networking and Opening Remarks
09:00 AM	Keynote Presentation: The Service Culture Journey, with Jeff Toister
09:45 AM	Sponsor Case Study Presentation: Customer Experience Success: Trust, But Verify, presented by CCMC
09:55 AM	Keynote Presentation: Why CX Is No Longer Just Support, It's Leverage: The Shift from Cost Center to Business Advantage, with Ty Givens
10:40 AM	Break
10:55 AM	Sponsor Case Study Presentation: AI, Without the Hype: What Actually Works for CX Leaders, presented by NiCE
11:05 AM	Technology Panel: When CX Leads, Technology Follows, with Siva Balu, Nicole Joraanstad, Christopher Neuharth, and Lisa Pavelski
12:15 PM	Lunch
12:45 PM	UW–Madison Lightning Talks: Katie Gaertner, Xiaoyang Long, Giustina Parisii
1:15 PM	Networking and Closing Remarks

KEYNOTE SPEAKER



Jeff Toister

Bestselling author of *The Service Culture Handbook*

Jeff's first customer service interaction ended in a service failure. Vowing to learn from that experience, he became obsessed with customer service.

Today, he's the bestselling author of four books, including *The Service Culture Handbook*.

More than 11,000 customer service professionals around the world subscribe to Jeff's Customer Service Tip of the Week email.

And, over 5 million people have taken his training courses on LinkedIn Learning.

KEYNOTE SPEAKER



Ty Givens

Founder & CEO of CX Collective and CX Collective Advantage

Ty Givens is one of the most trusted voices in customer experience today. With over 20 years of leading CX strategy and operations across Fortune 500 enterprises and high-growth startups, she's built and transformed organizations for brands including Intuit, Herbalife, Molina Healthcare, Thrive Market, See's Candies, Ilia Beauty, and Shoedazzle. Ty specializes in turning support functions into proactive growth engines through smarter systems, scalable infrastructures, strong leadership development, and future-ready technology such as automation and AI.

Through CX Collective, Ty brings a uniquely practical, frontline-tested approach, shaped by decades of hands-on experience that most consultants never gain. She has guided over 50 companies through operational turnarounds, team scaling, and strategic technology deployments, and created more than 20 industry-leading playbooks and masterclasses for CX leaders. Known for her clarity, energy, and actionable frameworks, Ty empowers audiences to bridge the gap between theory and execution, building customer experience operations that drive measurable, sustained impact.

FEATURED PANELISTS



Siva Balu

Chief Information & Digital Officer, Sr. VP, Quartz Health Solutions



Nicole Joraanstad

Director of the IT Customer Engagement Center of Excellence, TDS Telecommunications



Christopher Neuharth

Chief Experience Officer, Children's Wisconsin



Lisa Pavelski

Director of Digital Capabilities, TruStage

LIGHTNING TALK SPEAKERS



Katie Gaertner

Business Analytics Lecturer
UW–Madison



Xiaoyang Long

Professor
Wisconsin School of Business



Giustina Parisi

Marketing Teaching Faculty
UW–Madison

SPONSOR & SPONSOR CASE STUDY



Customer Experience Success: Trust, But Verify

Presented by David Beinhacker, Chief Research Officer, Customer Care Measurement & Consulting (CCMC)

Most organizations have ambitious customer experience goals but fall short because they obsess over scores instead of acting on what customers are telling them. In this fast-paced case study session, you'll see a practical example of how to move from navel-gazing at VOC metrics to mobilizing insights that measurably improve experiences and business outcomes.

Customer Care Measurement & Consulting (CCMC)

customercaremc.com

CCMC is a full-service CX survey partner empowering Fortune 500 market leaders from every industry with expertise that transforms customer feedback into action—enabling companies to sustain excellence and outperform competitors through practical, insight-driven change.

SPONSOR & SPONSOR CASE STUDY



AI, Without the Hype: What Actually Works for CX Leaders

Presented by Gannon Harris, Enterprise Account Executive, NiCE

A practical, experience-based look at why many AI initiatives stall—and how CX leaders can use an operating model to de-risk AI, prioritize what matters, and deliver real outcomes.

NiCE

www.nice.com

NiCE is transforming the world with AI that puts people first. Our purpose-built AI-powered platforms automate engagements into proactive, safe, intelligent actions, empowering individuals and organizations to innovate and act, from interaction to resolution. Trusted by organizations throughout 150+ countries worldwide, NiCE's platforms are widely adopted across industries connecting people, systems, and workflows to work smarter at scale, elevating performance across the organization, delivering proven measurable outcomes.

Create a NiCE world.

WHO'S ATTENDING TODAY

As you explore today's customer experience sessions, take full advantage of the opportunity to connect with a vibrant mix of professionals—seasoned leaders, up-and-coming changemakers, and forward-thinking solution partners. Whether you're sparking new ideas, trading insights, or discovering synergies, every conversation is a chance to grow your network and elevate your perspective. From fellow attendees to speakers and sponsors, the people here today share a common goal: driving meaningful progress. Here's a look at the organizations represented—each one bringing their unique lens to the future of customer experience strategy.

- Alliant Energy
- Alta Resources
- Badger Meter
- Brunswick Corporation
- CCMC
- Change Accelerators
- Charter Steel
- Children's Wisconsin
- Church Mutual
- Clarios
- Clocktower Advisors
- CNH Industrial
- Colony Brands
- Community First Credit Union
- Compeer Financial
- CROPP/Organic Valley
- Delta Dental of Wisconsin
- Duffek Construction
- Faith Technologies Incorporated
- Findorff
- Generac Power Systems
- Harley-Davidson
- Kohl's
- Lake Ridge Bank
- Lands' End
- Lumora Collective
- Madison Gas & Electric
- Menasha Packaging
- Mercury Marine
- Milwaukee Tool
- NiCE
- nvisia
- ORBIS Corporation
- Promega
- Quartz Health Solutions
- Rocket Industrial
- TDS Telecom
- Tormach
- TruStage
- UW Credit Union
- Werner
- WI Dept. of Employee Trust Funds
- Wind River Payments
- Xmwize

List as of March 6 2026

THANK YOU TO OUR STEERING COMMITTEE!



Tom Eberhardt
Manager, Consumer Experience & Operations, Delta Dental of Wisconsin



Andrew Fjerstad
VP of CX, CROPP/Organic Valley



Dana Moyano
CX Director, nvisia



Johnathan Murphy
Associate Manager Customer Experience, TDS

CONTINUE YOUR LEARNING JOURNEY WITH UWEBC

Your journey doesn't end here—it's just the beginning. Staying ahead in the digital age means continuously building on what you've learned. Use the energy and insights from today as a springboard to dive deeper into new concepts, sharpen your skills, and expand your impact. Below, you'll find a curated selection of opportunities designed to help you keep growing long after the event wraps up.

Measuring What Matters: Moving from Metrics to Meaningful Outcomes

April 16, 2026, In Person at the Pyle Center, Madison, WI, or Online
Join your UWEBC peers to bridge the linguistic divide between customer 'happiness' and hard financial reality by mastering the transition from traditional metrics to the meaningful, moment-based outcomes that prove CX is a strategic, profit-generating engine. *For UWEBC members only – Non-members may contact us at info@uwebc.wisc.edu for a guest pass!*
Learn more: https://uwebc.wisc.edu/uwebc-events

Ground Truth: AI for Business Summit

April 16 - 17, 2026, In Person at Memorial Union, Madison, WI, or Online
AI is moving faster than most organizations can keep up. Ground Truth is designed for leaders who want to move beyond experimentation and deploy AI for real business value. This Summit, hosted by the Wisconsin School of Business's AI Hub, explores real-world, evidence-based applications of artificial intelligence in business. Expect insights from academic research and business leaders on deploying AI with confidence. *UWEBC members receive a 40% discount!*
Learn more: https://business.wisc.edu/event/aisummit/

Post-Close Advocacy: Turning Customers into Your Strongest Sellers

May 12, 2026, Online Only
Discover how to turn satisfied customers into a structured advocacy engine that drives retention, expansion, and measurable brand credibility long after the deal is closed. *For UWEBC members only – Non-members may contact us at info@uwebc.wisc.edu for a guest pass!*
Learn more: https://uwebc.wisc.edu/uwebc-events/

Wisconsin Digital Symposium and Wisconsin Manufacturing Summit

June 1–2, 2026, In Person at Lambeau Field, Green Bay, WI, or Online
This year's Wisconsin Digital Symposium features a new format and location. It will be co-located with the Wisconsin Drives Manufacturing Summit on June 2nd at Lambeau Field in Green Bay, home of the Green Bay Packers! The program focuses on how organizations are putting digital, data, and technology capabilities into practice across operations and manufacturing. *You will receive a complimentary pass to the Manufacturing Summit when registering for the Digital Symposium.*
Learn more: https://uwebc.wisc.edu/wisconsin-digital-symposium/

2026 Annual Business Best Practices & Emerging Technologies Conference

October 6, 2026, In Person at Monona Terrace, Madison, WI, or Online
The UWEBC Annual Conference brings together business and technology leaders to explore practical strategies and forward-looking innovations shaping today's organizations. The program blends proven best practices with emerging technologies, highlighting how leaders are driving performance, resilience, and growth in a rapidly changing environment.
Learn more: https://uwebc.wisc.edu/conference/

Interested in becoming a UWEBC member?

UWEBC members are world-class companies from a broad range of industries who come together in our collaborative community to learn best practices, explore emerging technologies, and develop new competencies in their employees.

Join this vibrant community of world-class companies to experience all the benefits of membership, including more than 60 peer group events a year across four focus areas: Customer Experience & Marketing, People, Supply Chain & Manufacturing, and Technology, Data & AI.

Membership costs are tax-deductible gifts to the university. This contribution gives all of your employees access to our regular peer group learning events as well as our Advisory services throughout the year.

Learn more about membership: https://go.wisc.edu/uwebc-membership

THE RESOURCES BEHIND THE EXPERTS



Christopher Neuharth

Compassionomics, by Stephen Trzeciak & Anthony Mazzarelli – Uses rigorous scientific research to demonstrate that compassion and human connection are not just moral ideals but measurable drivers of better outcomes, trust, and experience in healthcare and beyond.

Unreasonable Hospitality, by Will Guidara – Shows how organizations can transform ordinary service into unforgettable experiences by empowering people to exceed expectations and create deeply personal moments for customers.

Winning on Purpose, by Fred Reichheld, Darci Darnell, Maureen Burns – Reframes business success around the principle of enriching customers' lives, demonstrating how customer love, loyalty, and advocacy drive sustainable growth through the Net Promoter System.



Giustina Parisi

Chip & Dan Heath – Translate behavioral science into practical frameworks that help organizations design clearer communication, better decisions, and experiences that are simple, memorable, and meaningful for customers.



Katie Gaertner

Hard Fork - Explores the rapidly evolving world of technology and AI through sharp analysis and storytelling, helping CX leaders understand how emerging tech will reshape customer expectations and digital experiences.

Steve Nuori - Curates timely AI developments and sparks thoughtful discussions that help leaders think critically about how AI will influence business, work, and customer interactions.

Andrew Ng - Provides clear, practical perspectives on artificial intelligence and machine learning that help organizations understand how AI can be responsibly applied to improve products, services, and customer experiences.

Co-Intelligence - Living and Working with AI, by Ethan Mollick - Explores how humans and AI can collaborate effectively, offering practical guidance for integrating AI into everyday work to enhance decision-making, creativity, and customer value.

THE RESOURCES BEHIND THE EXPERTS

Siva Balu



Freakonomics Radio - It applies behavioral economics to real-world decisions, helping CX leaders understand the hidden incentives and psychological drivers behind customer behavior.

TLDR AI - It provides fast, curated updates on AI breakthroughs that are rapidly reshaping digital journeys, automation, and personalization in customer experience.

How I Built This with Guy Raz - Founder stories reveal how successful companies craft products, brands, and experiences that create deep emotional connections with customers.

Xiaoyang Long



a16z Podcast – Explores emerging technologies, market shifts, and product innovation through conversations with founders, operators, and technologists, helping CX leaders anticipate how new platforms and capabilities will reshape customer expectations and digital experiences.

Management Science (Journal) – Publishes rigorous academic research on decision-making, operations, economics, and organizational behavior that provides evidence-based insights into how systems, incentives, and strategy shape customer and employee experiences.

John List (University of Chicago economist) - His posts translate cutting-edge behavioral economics and field experiment insights into practical lessons on incentives, pricing, and decision design that help leaders understand what truly motivates customers and employees.

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HOW TO INFLUENCE SERVICE CULTURE

Jeff Toister

You want a service culture, but you're caught in the middle.

Formal authority allows you to guide your own team. You can set the tone there, and build the type of culture other teams admire. The kind of culture where employees are obsessed with service.

But you're not the CEO. You can't set the tone for the entire organization or direct other departments to leaders to follow the same path.

You can only influence them.

In this article, I'm going to share what I've seen work and what hasn't worked. This comes from my own experiences trying to influence service culture, talking to hundreds of leaders, and researching customer-focused organizations.

Step 1: Let it go

The biggest step is realizing you can't make demands. Wishing and hoping won't work, either. You can only influence culture outside of your team.

This was a lesson I learned the hard way.

I was once the training director for an organization with more than 4,000 employees. My team was responsible for helping managers and their teams meet our company's service standards.

It was initially frustrating when a manager shrugged off training or was lax about meeting the standards. I couldn't understand why they wouldn't just get on board when it was part of their job.

Then I realized these managers were doing me a favor. They became a control group by not participating in mandatory training or implementing required service standards. I could compare their performance to other managers who did embrace the culture to prove whether the culture created better business results.

I was able to improve that managers who embraced our service standards outperformed managers who didn't. Their performance shone where it counted: client retention, employee retention, and financial performance.

You need data to influence. Let go of your frustration with other teams and use them to give you data.

Step 2: Be the model

You must embrace the service culture if you want to influence others.

I once worked with a client who was new to her organization. Sue took over a department that had a reputation for poor performance. She wanted to turn that around.

Sue didn't start with demands. She started by showing her team what great service looked like. Modeling the culture she wanted gave her more credibility when she asked the team to follow.

Later on, it gave Sue credibility with other leaders when they came to ask for her secrets.

Step 3: Build team culture

Once you model the culture, you can enlist your team to do the same.

Sue started with a vision. She wanted her department to be the best in the organization. Later, she worked with her team to define a specific ***customer service vision statement.*** This became a shared definition of outstanding culture that got everyone on the same page.

Next, Sue made sure everyone understood how they contributed to the culture. Each team member could answer three questions:

What is the vision?
What does it mean?
How do I personally contribute?

Finally, Sue aligned all of her decision-making with the vision. Goal-setting, training, hiring, empowerment, and her communication as a leader all went back to the vision. Employees clearly understood the department's purpose and they embraced it.

Eventually, Sue's team earned that reputation for being the best. They became a true model of service culture. That's when she was ready to influence others.

You can get a step-by-step guide to building culture from ***The Service Culture Handbook.***

Step 4: Data, then wisdom

You're now ready to influence others. Start with proof that your culture is working.

Sue had customer service survey data, a pile of customer compliments, and a growing list of stories to prove that her team was doing something right. She shared this with her boss and other managers first to demonstrate her credibility.

I learned the same thing as a training director. Having a control group of managers who didn't embrace the culture helped me prove to our executive team that managers who bought in to the culture performed better.

Sue and I found ourselves in the same position. Once we established something was working, other leaders came to us and asked for our secrets.

That was influence.

The Big Caveat

This plan isn't a quick fix. There will be ups and downs. Quick wins and frustrating set-backs. Stick with it.

It took Sue two years to build her team culture and her boss and get other departments to fully embrace what her team was doing. It was two years before other teams started copying Sue's plan.

My experience was roughly the same. Two years to build the team culture, gather enough data, and be able to influence executives and managers.

I've seen a similar pattern in many organizations. It takes time, commitment, and grit to follow this plan. But it works.

Conclusion

Become a service culture influencer in your organization.

Let it go: you can't control others.
Be the model: show everyone what service culture looks like.
Build team culture: guide your team to set the standard.
Data, then wisdom: prove your culture works before sharing your secrets

This article was originally published on Jeff Toister's LinkedIn newsletter, Customer Obsessed on February 10, 2026.

FROM METRICS TO MEANING: MASTERING KPIS TO TRANSFORM CUSTOMER LOYALTY

Ty Givens

The rules of customer experience are shifting fast. Metrics that once defined "good CX" are starting to feel outdated—and leaders who cling to them risk falling behind. In this new era, loyalty isn't won by tracking surface-level satisfaction. It's built by ***mastering KPIs*** that reveal what really matters and turning those insights into meaningful action.

At CX Collective, we see this evolution every day. The research says it plainly: satisfaction alone doesn't create loyalty. The companies thriving right now are the ones reading the signals that predict advocacy, retention, and lifetime value—not just short-term wins.

That's why KPI mastery isn't just a reporting exercise anymore. It's the backbone of modern customer relationships—and the proof your experience strategy is actually working.

Beyond Satisfaction: Why Mastering KPIs Matters More Than Ever

Most CX teams track metrics like NPS, CSAT, and average resolution time. They're easy to benchmark and look great on a dashboard—but they only tell part of the story.

Customers today expect more than fast answers and friendly tone. They want to feel known, valued, and supported across every step of their journey.

To measure that kind of connection, your KPIs need to evolve. Traditional metrics can't always capture emotional drivers like trust or belonging. Without the right signals—and without mastering KPIs that reveal them—it's easy to miss the "why" behind your numbers and the next opportunity to deepen loyalty.

DIY Mastery: Four Steps to Master KPIs and Modernize CX Measurement

You don't need a new platform or a six-month consulting project to level up your metrics. Start with these practical steps to move beyond satisfaction and toward true loyalty:

1. Redefine the Outcomes That Matter

Start by aligning KPIs with your actual business goals—repeat purchase, product adoption, or advocacy. Bring teams together across functions to clarify what success looks like at each stage of the journey. Then, tie metrics directly to those outcomes. For instance, don't stop at NPS; track referral frequency or renewal rate for clearer loyalty indicators.

2. Analyze the Complete Journey—Not Just Touchpoints

Pull insights from every corner: support logs, product analytics, feedback forms, even cancellation notes. Map the full customer lifecycle and look for moments where customers stall or drop off. These inflection points often hold your biggest opportunities to turn satisfaction into advocacy—or to prevent churn before it happens.

3. Track Emotional and Behavioral Signals

Go deeper than numbers. Blend quantitative data with qualitative feedback—survey comments, agent notes, social mentions. Use them to identify emotional cues like frustration, relief, or excitement. Even a lightweight text analysis can uncover patterns that standard metrics overlook. Consider simple post-interaction pulse surveys to measure perceived empathy, trust, and helpfulness.

4. Make Metrics Actionable and Visible

KPIs should inform daily action, not just monthly reports. Create shared dashboards—Google Sheets works fine—that connect emotional, operational, and financial metrics. Bring this data into weekly standups and ask, "What are we learning—and what will we do differently?" Real-time insight drives real-time improvement.

Your Next Move: Get the KPI Mastery Playbook

If you're ready to modernize how your team measures success, check out our ***KPI Mastery Playbook.*** It includes templates, checklists, and real-world examples to help you connect the dots between metrics, meaning, and measurable growth.

Consider it your practical shortcut to mastering KPIs that everyone on your team can use—and trust.

Takeaway: Measurement Is the Map, Not the Destination

What you measure shapes what you deliver. The brands with the most loyal customers aren't guessing—they're learning quickly, acting boldly, and measuring what truly drives trust.

If you want customer relationships that last, stop treating KPIs as a scoreboard and start using them as a guidance system. Map the signals that matter, measure what drives advocacy, and you'll uncover new ways to elevate every experience—no outside help required.

Ready to move from metrics to meaning? Start with one small change this week, and watch how it sharpens your focus on what really drives loyalty. The future belongs to CX leaders who know what to measure—and what to do with what they learn.

This article was originally published on the CXAdvantage Blog on November 20, 2025.