SMART CustomerService 2018

APRIL 9–11 2018
WASHINGTON, DC
Renaissance Washington, DC Downtown Hotel

ATTEND SMART CUSTOMER SERVICE 2018 AND LEARN HOW TO:

- Provide friction-free customer service.
- Manage the shift to a customer-centric corporate culture.
- Prepare for an almost fully automated world.
- Improve morale and employee engagement.
- Create a culture of ownership in your company.
- Empower genuine empathy from your agents.
- Get your team obsessed with service.

SMARTCUSTOMERSERVICE.COM/2018
Delivering smart customer service—and all of the activities that it entails—has become a key component in value-creation for both customers and the companies they support. At this year’s Smart Customer Service conference, you will be able to learn from peers who have tackled the tough issues and been successful despite setbacks and false starts.

Check out the sessions that offer real-world case studies that will give you an honest look at how other organizations have handled transitions and new program implementations. Learn from your peers’ successes and mistakes so you can be better prepared to tackle similar customer service projects.

Of course, you will also hear from leading analysts and consultants with their in-depth, expert perspectives on everything from creating a customer-centric corporate culture to engaging employees so they want to go that extra step to build true customer loyalty.

If you get a chance, take a look at our two co-located, customer-focused conferences, CRM Evolution and SpeechTEK, which offer unique perspectives on serving today’s exacting customer and prospects.

Bob Fernekees
Publisher, CRM magazine

GENERAL INFORMATION

GRAND OPENING RECEPTION
Join your peers on Monday from 5:00 p.m. – 7:00 p.m. as we celebrate the grand opening of the Customer Solutions Expo located in Grand Ballroom North. Visit with conference sponsors, exhibitors, speakers, and other attendees while enjoying light hors’oeuvres and drinks.

NETWORKING RECEPTION
Join your peers on Tuesday evening from 5:30 p.m. – 7:00 p.m. for a networking reception. The reception will take place in the Hotel Lobby. Mingle with exhibitors, speakers, and conference attendees while enjoying good food and drinks.

CONTINENTAL BREAKFAST & BREAKS
A continental breakfast is provided for conference attendees each morning from 8:00 a.m. to 9:00 a.m. before the keynote session. Additional breaks will take place each day. Please check the schedule for exact times and locations.

ONLINE PRESENTATIONS
Speaker presentations are currently available online. These presentations will also be available after the conference. Click on the presentations tab on the conference website.

WI-FI
Wireless internet access is available in the conference session rooms. Log in to the Renaissance_CONFERENCE network; open browser for login page; enter access code: infotoday; click on Submit.

PRESS ROOM/MEDIA CENTER
The press area is located in the Meeting Planner Office B. The press room hours are as follows:

Monday, April 9................................. 8:30 a.m. – 4:30 p.m.
Tuesday, April 10.............................. 8:30 a.m. – 4:30 p.m.
Wednesday, April 11......................... 8:30 a.m. – 1:00 p.m.

CUSTOMER SOLUTIONS EXPO
Combining the Smart Customer Service, CRM Evolution, and SpeechTEK showcases, this central gathering place features the leading sales, marketing, customer service, and speech recognition solutions. It is the perfect opportunity to meet with C-level executives, industry pioneers, and the technology gurus who help you do your job better.

CUSTOMER SOLUTIONS EXPO HOURS

<table>
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<tr>
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<tbody>
<tr>
<td>Monday, April 9</td>
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<td>Grand Opening Reception</td>
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<td>Tuesday, April 10</td>
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<td>Wednesday, April 11</td>
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REGISTRATION DESK HOURS

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FOLLOW US ON TWITTER!
For conference updates, follow @SmartCustServ on Twitter. Join Smart Customer Service group discussions by clicking on #SmartCS and including it in your tweets.

GET THE APP & CONNECT!
Download the HelloCrowd app and search for Smart Customer Service to access everything you need during the event. See details on page 15.

Enter URL: http://hca.io/e/nqvkz9t

#SmartCS
MONDAY, APRIL 9

8:00 a.m. – 9:00 a.m.  REGISTRATION & CONTINENTAL BREAKFAST  
9:00 a.m. – 10:00 a.m.  WELCOME & OPENING KEYNOTE  
10:00 a.m. – 10:15 a.m.  KEYNOTE  
10:15 a.m. – 10:45 a.m.  COFFEE BREAK  
10:45 a.m. – 11:10 a.m.  TRACK A – Creating a Customer-Centric Culture  
11:10 a.m. – 11:45 a.m.  TRACK A – Expert Perspectives  
11:45 a.m. – 12:30 p.m.  TRACK A – From Onboarding to “Onbotting”  
12:30 p.m. – 1:00 p.m.  KEYNOTE LUNCH  
1:00 p.m. – 1:30 p.m.  SOLUTION SESSIONS  
2:00 p.m. – 2:45 p.m.  SOLUTION SESSIONS  
3:00 p.m. – 3:45 p.m.  SOLUTION SESSIONS  
4:00 p.m. – 4:45 p.m.  SOLUTION SESSIONS  
5:00 p.m. – 7:00 p.m.  GRAND OPENING RECEPTION

TUESDAY, APRIL 10

8:00 a.m. – 8:45 a.m.  CONTINENTAL BREAKFAST  
9:00 a.m. – 10:00 a.m.  WELCOME & OPENING KEYNOTE  
10:00 a.m. – 10:45 a.m.  COFFEE BREAK  
10:45 a.m. – 11:30 a.m.  TRACK A – The State of Customer Service  
11:30 a.m. – 12:15 p.m.  TRACK A – Tales from the Trenches—Best Practices From Real-Life CRM Successes  
12:15 p.m. – 1:00 p.m.  KEYNOTE LUNCH  
1:00 p.m. – 1:30 p.m.  SOLUTION SESSIONS  
2:00 p.m. – 2:45 p.m.  SOLUTION SESSIONS  
3:00 p.m. – 3:45 p.m.  SOLUTION SESSIONS  
4:00 p.m. – 4:45 p.m.  SOLUTION SESSIONS  
5:00 p.m. – 7:00 p.m.  NETWORKING RECEPTION

WEDNESDAY, APRIL 11

8:00 a.m. – 8:45 a.m.  CONTINENTAL BREAKFAST  
9:00 a.m. – 9:45 a.m.  TRACK A – Are You Transitioning or Transforming?  
10:00 a.m. – 10:45 a.m.  TRACK A – 5 Proven & Time-Tested Customer Service Strategies to Absolutely Explode Your Revenue & Build a Raving Fan Base  
10:45 a.m. – 11:45 a.m.  BREAK IN THE  
11:45 a.m. – 12:30 p.m.  TRACK A – Emotion: The Missing Ingredient in Customer Experience  
12:30 p.m. – 1:00 p.m.  LAST CHANCE TO VISIT THE  
1:00 p.m. – 1:30 p.m.  TRACK A – Creating a Customer Journey Map  
1:30 p.m. – 2:15 p.m.  TRACK A – Planning for CRM Success
B101 = Creating Fans: Better Customer Experiences Through Culture, Commitment, and Consistency
Colin Gold, Speaker, Gold Level Hospitality
Outstanding customer service does not happen by accident. To distinguish your business, you need to turn your current customers into fans. Why? Because fans are loyal, they return, they talk, share, and they post! In this talk designed for leaders, we discuss the steps needed to take an ordinary customer experience and make it extraordinary and create a fan culture. Attendees will leave being able to start the process of creating a fan culture in their business; lead their team to support and grow this culture long-term; and make fan experiences happen throughout the organization on a regular basis.

11:45 a.m. – 12:30 p.m.
A102 = Creating a Customer-Centric Company
Geoff Ailes, Managing Partner, CS Insight
The reason employees engage is the passionate pursuit of a better customer experience. This level of customer-centricity is far from being a new concept, but the techniques and digital workplace tools that can make it a reality have advanced significantly in recent years. In this session, attendees learn an easy-to-remember, five-step framework for people-centric success in the digital age; the connection between employee engagement and innovative customer experiences; how data, processes, people, and culture have to align; and how to balance the often-conflicting organizational disciplines that result in the best customer experiences. Real-world examples of companies leading the transformation toward customer-centricity are given.

2:00 p.m. – 2:45 p.m.
A103 = Seriously Sparkly Service: The Power of Profoundly Remarkable
Chip Bell, Senior Partner, Chip Bell Group
Recall the absolutely best customer service experience of your entire life. What made it so spectacular? Today’s customers do not talk or tweet about good service: only experiences they find unique, special, and ingenious. Value-added service (taking what customers expect and adding more) will not provide a solid ROI and only serves to further elevate customers’ expectations. Value-unique service (delivering an unexpected, compelling surprise) creates animated and animated discussions around product education or plan updates. The session looks at the challenges and successes AAA-WCNY navigated while implementing its technology program.

COFFEE BREAK
10:45 a.m. – 11:30 a.m.

A103 = Seriously Sparkly Service: The Power of Profoundly Remarkable
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B103 = Human Resource Renewal: Using Performance Management to Enhance Staff Engagement & Customer Service
Rob Philpott, CFO, City of Summerside, Prince Edward Island, Canada
This case study session looks at how to successfully reorganize in the public sector to achieve higher workforce engagement and increase citizen satisfaction. It discusses how to build leadership commitment and set clear expectations and performance management practices; how staff can successfully engage through good planning, creative thinking, and inclusive methodology; how clear performance expectations lead to more engaged staff and better customer service outcomes; and why the tone at the top is critical for any successful reorganization.

3:00 p.m. – 3:45 p.m.
SOLUTION SESSIONS
Zendesk = Meeting Rooms 10/11

B104 = Infusing Humanity Into Digital Interactions
Aimee Lucas, VP & Customer Experience Transformist, Temkin Group
While new technology can make it easier to help customers achieve specific goals, it doesn’t inherently address their full needs. Companies still need to craft interactions that connect with customers at an emotional level. To understand how to build stronger bonds, Temkin Group shares its research on the Human Conversational Model, showing how companies can improve their digital efforts by adopting lessons culled from an analysis of successful human-to-human interactions. During this session, attendees learn how consumers currently view their experiences today; why it’s critical to design digital interactions that are both functional and emotionally stimulating; and how to create engaging conversations instead of just deploying digital technology.

4:00 p.m. – 4:45 p.m.
A104 = Infusing Humanity Into Digital Interactions
Aimee Lucas, VP & Customer Experience Transformist, Temkin Group

B104 = How to Provide the Best Customer Care on Social Media
Frankie Saucier, Host, The Socially Supportive Podcast
What do customers really want from you when they reach out on social media? Why are they so angry? Frankie Saucier, host of the Socially Supportive Podcast, provides answers to this. She also shares today’s real-world use cases for social and digital customer care and reveal nine fantastic responses that help diffuse angry customers and turn them into loyal brand fans!

5:00 p.m. – 7:00 p.m.
GRAND OPENING RECEPTION
SMARTCUSTOMERSERVICE.COM/2018
MONDAY, APRIL 9
#SmartCS
Y’ALL JOIN US
for the { grand opening reception }
Explore the latest products and services from the top companies in the marketplace while enjoying some chow and drinks.

HARMONY BETWEEN AUTOMATED AND LIVE CUSTOMER SERVICE?

YOU BOT THERE IS!

Check out Aspect’s NLU Lab, powered by our team of experts and dedicated to the advancement of chatbot applications through the sharing of knowledge, best practices, experiences and success stories.

Learn more at aspect.ai
8:00 a.m. – 8:45 a.m.
CONTINENTAL BREAKFAST

MODERATOR: Paul Greenberg, President, The 56 Group, LLC

Breakfast With the Influencers

Have breakfast and an interactive chat with many of CRM’s leading influencers. What is driving customers? What are leading-edge technologies? What about hype versus reality on artificial intelligence? This is an excellent opportunity to hear from the people driving the industry in an uncensored, unfiltered format. All of your questions are fair game, and will be answered to the best of our ability. Enjoy good food, good conversation, and the networking with top leaders in the field. This is a truly unique opportunity and conference highlight.

9:00 a.m. – 10:00 a.m.  ⏰ South/Central (Autism Room Level)
How Artificial Intelligence Is Changing the Contact Center
Pasquale DeMaio, GM, Amazon Connect, AWS

Conversational interfaces, or intelligent “chatbots,” are defining entirely new categories of products and services. Deep learning technologies are empowering businesses to gain critical insights from unstructured text in transcribed calls, chats, and social media. Contact centers have been early adopters of these artificial intelligence (AI) technologies. Customers can seamlessly communicate across channels with automated assistants that delight customers, providing them with faster and better service. AWS is making AI more accessible, available, and easy to use, enabling customers to accelerate their usage of AI in contact center workflows. Learn how AI-powered applications are providing business value by rethinking traditional applications and transforming customer experiences and how to leverage these innovations in your workflows instantly.

10:00 a.m. – 10:45 a.m.
BREAK IN THE CAFE

10:45 a.m. – 11:30 a.m.

A201 = The State of Customer Service

Esteban Kohlsky, Founder, ThinkJar

This session, based on ThinkJar’s seventh state of customer service study, draws from more than 120 interviews of customer service practitioners to uncover the state of customer service today and where it is heading in the future. It covers what is working and not working in customer service, using qualitative findings rather than quantitative research. The session provides a framework to help attendees analyze their current setups, compare them to the larger universe of customer service practitioners, and plan for the future after digital transformation projects have been implemented.

11:45 a.m. – 12:30 p.m.
A202 = Tales From the Trenches—Best Practices From Real-Life CRM Successes

Rebecca Wettemann, VP, Research for Enterprise Applications, CRM & Cloud, Nucleus Research

Drawing on hundreds of case studies of successful CRM service deployments with most of the major vendors, Wettemann explains the pitfalls to avoid, provides a checklist to manage a successful project, and shares the five key factors to ensure measurable value from your next initiative.

12:45 p.m. – 1:45 p.m.
KEYNOTE LUNCH

Sponsored by

B201 = What Millennials Want in the Workplace (And Why You Should Start Giving It to Them)

Terra Fletcher, Marketing Consultant/Corporate Trainer, Fletcher Consulting

Millennials are now the largest generation in the workforce, and they are quickly becoming the most influential. As Digital Natives, they can provide valuable feedback on product design and user experience that a Traditionalist or Boomer might overlook. They can serve as reverse mentors, forcing older workers to keep their skills current. To create a Millennial-friendly workplace, there are a few things to understand first. This session examines what Millennials expect in an office, how they believe relationships between employers and employees should be structured, and how everyone can become more fluent in the languages and habits of these Digital Natives.

1:45 p.m. – 2:45 p.m.


Jean Mark Bredeson, President, SERVICE 800

Improving customer experience has become a major priority for businesses trying to differentiate themselves and create a competitive edge, but accurate and reliable customer experience metrics can be difficult to calculate. This session discusses emerging methodologies, how to set reasonable objectives, and practical insights from four real-world case studies. It identifies the current leading CX methodologies, their pros and cons, and their degree of global acceptance and discusses how the right measurement and CX strategy can increase revenue, retention, and user satisfaction.

B202 = Pay for Performance—Leveraging Analytics to Make Your Program Work

Kim Williams, COO, SaviLinx

An engaged customer service team delivers double the benefits: Customer connections are deeper, and agent job satisfaction rises. Building that kind of a team requires a workplace that fosters genuine, ongoing enthusiasm. This session looks at how SaviLinx used data and metrics to develop a pay-for-performance program and is now helping its team grow personally and professionally while strengthening customer connectivity and satisfaction. Attendees learn how to develop win-win targets, not bribes; use data to align incentives with goals; build a

Sessions are located in either Meeting Rooms 10/11 (Track A) or Meeting Rooms 8/9 (Track B) unless otherwise noted.
transparent, measurable process that keeps agents engaged; and, make it work within budget while delivering a compelling ROI.

3:00 p.m. – 3:45 p.m.
**SOLUTION SESSIONS**
*Lithium* - Meeting Rooms 10/11

3:45 p.m. – 4:30 p.m.
**BREAK IN THE**

4:30 p.m. – 5:15 p.m.

A204 = Your Customers Are Talking About You: Do You Know What They Are Saying?
*Randi Busse, President, Workforce Development Group*

Thanks to social media, you no longer own your brand. Your customers do. With the click of a mouse or the tap of a finger, customers can tell the world about their experiences, and strangers will use that information to make decisions about whether to buy from you. In this session, attendees learn just what customers are saying, whether social media is scaring away your customers, and how to change the stories your customers are telling.

B204 = Using ‘Points of Connection’ to Create Customer Advocates
*Andre Boykin, Speaker, Author, Consultant, CAPITAL iDEA*

Having satisfied customers is no longer good enough to compete and sustain your business. To remain competitive and be a market leader, you have to go beyond customer satisfaction. You have to create customer advocates. Unfortunately, most organizations are missing the mark because they fail to first create an organizational framework for customer awareness. This solution-oriented session explores the strategies leaders can implement to create organizations built around delivering exceptional customer service. Attendees discover the three “Points of Connection” that impact customers emotionally and why these points are key to creating customers who are willing to recommend your company to others.

5:30 p.m. – 7:00 p.m.
**NETWORKING RECEPTION** - Hotel Lobby
8:00 a.m. – 8:45 a.m.

CONTINENTAL BREAKFAST

9:00 a.m. – 9:45 a.m.

A301 = Are You Transitioning or Transforming?
Andre Boykin, CAPITAL IDEA

Change is a constant refrain from leaders trying to improve performance and gain a competitive advantage. But what does it take to have sustainable change in your organization? In this session, attendees discover the principles of transformation and the mindset growth leaders need to allow new ideas to be inculcated in the organization, how effective leaders can cause transformation, and how to create a new beginning for greater results and effectiveness.

10:00 a.m. – 10:45 a.m.

A302 = 5 Proven & Time-Tested Customer Service Strategies to Absolutely Explode Your Revenue & Build a Raving Fan Base
John Di Lemme, High-End Marketing Consultant & Strategic Business Coach, Di Lemme Development Group

This session looks at the true meaning of customer service and why just doing your job isn’t enough. Attendees learn how to create a culture of customer service, daily strategies to create a raving fan base, the value of the first and last impressions, how to create unforgettable memories and experiences for your customers, how marketing is the first step in providing five-star customer service, and the one thing they can do for customers that competitors simply aren’t willing to do. Building long-term relationships with customers through customer service will be more profitable than any type of advertising, and attendees leave this session with the knowledge to make it happen.

10:45 a.m. – 11:45 a.m.

B301 = 12 Phrases That Belong in Every Strong Work Culture
Derrick Ricca, Senior Sales Manager, Greenleaf Hospitality

Engagement has been all the buzz since 2015. Technology continues to change how we service customers. This session looks at innovative attempts to improve customer service by four companies in four industries. Attendees learn the 12 key phrases that these companies share that provide insight into what should be inserted into your own company culture.

12:30 p.m. – 1:00 p.m.

B302 = Customer Experiences in the 21st Century: The Customer Perspective
John Grizzy Grzywacz, President, John Grizzy Grzywacz Inc.

Many organizations are completely missing the mark when it comes to customer experiences. Even some recognized CRM strategies are antithetical to successful CX. In this session, attendees learn which common strategies should be avoided, why they don’t work, and how some 21st-century technology is negatively impacting customer experiences from a pragmatic standpoint. The session will challenge many of the accepted precepts of delivering exceptional CX in the 21st century, showing through real-world case studies which indisputable rules can ensure successful customer experiences.

POSTCONFERENCE WORKSHOPS

1:30 p.m. – 4:30 p.m.

W1 = Creating a Customer Journey Map
Geoff Ables, Managing Partner, CS Insight

One of the top reasons that customer care processes fail is a lack of alignment with the customer’s preferred process, and a one-size-fits-all approach. Do you know your customers well enough to know how to design a process that delights them at every step of the process? Learn how to understand customer personas and create journey maps to drive more effective customer service, including the following: Listen to your customers so they can tell you what their journey looks like; identify what customer personas look like and how they will affect your process and technology decisions; discover the starting point for persona definitions—and how to strategically expand from there; and define a journey map as the foundation of customer experience management processes.

W2 = Planning for CRM Success
Rick McCutcheon, Dynamics CRM MVP, RA McCutcheon Consulting

Customer relationship management is the business philosophy that lets you know your customers better, share information more thoroughly, and interact more completely. In business this can only be achieved through the integration of people, business processes, and the use of CRM and related technologies. This is a non-technical session designed for business professionals to learn how to plan and implement successful CRM strategies.

W3 = Using Automation to Create Ultra-Personalized Experiences
Tyler Gams, Founder & CEO, Box Out Marketing

Most marketers are using marketing automation to “spray and pray.” They’re blasting messages to the masses with decreasing effectiveness. When it doesn’t work, they increase the frequency, urgency, and scarcity. All of this turns off customers. When utilized correctly, marketing automation can actually create a deeper, more meaningful interactions and relationships that produce more value over time. Gams shows attendees real case scenarios of how effective automation can be utilized to serve customers better and sell more.
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Driven by technology. Differentiated by experience. Powered by people.

Because service is a human thing, even if it’s delivered by a robot. The world’s greatest brands trust us to deliver their customer service. Driven by technology and differentiated by experience, we ensure they perform. Powered by our people, we help them transform. We can do this for you, too.

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EXHIBITOR LIST

Aspect Software, Inc.................................................................101
Convergys ...............................................................................301
CRM Magazine ........................................................................TBD
Lithium Technologies LLC......................................................202
Relay Network ..........................................................................203
TeamSupport LLC ....................................................................215
Zendesk, Inc. ............................................................................201

FLOOR PLAN

Customer Solutions Expo Hours

Monday, April 9
5:00 p.m. – 7:00 p.m.
Grand Opening Reception

Tuesday, April 10
10:00 a.m. – 4:30 p.m.

Wednesday, April 11
10:00 a.m. – 1:00 p.m.

Break Area

Entrance

Diamond
SpeechTEK
CRM Evolution
Smart Customer Service
Download the Smart Customer Service App!

Get the entire Smart Customer Service program on your favorite mobile device. Download the HelloCrowd app from the Android or iOS store to stay engaged and up-to-date with the event and other attendees. Once downloaded, search for Smart Customer Service and add it to your device.

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Relay Network is a mobile engagement automation solution enabling businesses to deliver individualized, real-time service messaging that simplifies and improves the customer experience. Leading organizations across multiple industries use Relay—a 2017 Gartner Cool Vendor—to increase customer retention, improve CLTV, and reduce costs. For more information, visit our website.

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Lithium delivers awesome digital customer experiences at scale for the world’s biggest brands including Airbnb, AT&T, HP and Sephora. The Lithium engagement platform enables brands to manage multiple digital touchpoints—connecting customers, content and conversations at the right digital moment. Learn more at our website, join our community at community.lithium.com, or follow us on Twitter @LithiumTech.

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TeamSupport is customer support software built for business-to-business. With a focus on managing the whole customer relationship and unique tools like the Customer Distress Index, customizable SLAs, built-in customer chat, screen and video recording, and more, TeamSupport helps organize and improve help desk efficiency for a better customer experience.

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Zendesk builds software for better customer relationships. It empowers organizations to improve customer engagement and better understand their customers. Approximately 114,000 paid customer accounts in over 160 countries and territories use Zendesk products. Based in San Francisco, Zendesk has operations in the United States, Europe, Asia, Australia, and South America. Learn more at our website.

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Dallas, TX 75252

www.convergys.com

Booth No. 301

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Convergys’ Customer Interaction Technologies offer channel and technology-agnostic solutions that fit seamlessly into client environments, regardless of infrastructure. In addition, our outcome-based delivery model takes the risk out of digital transformation by providing service level agreements based on achievement of key performance metrics.

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