



Chief Customer Officer Forum

Customer Facing Leadership



Welcome from the CCO Forum Committee

Welcome to the sixteenth meeting of the Chief Customer Officer Forum, on behalf of the member committee and LimeBridge Australia. The theme for the day is “Customer Facing Leadership” and based on your feedback we have a slight change in format to try so we welcome your thoughts on this variation on our agenda.

Today we have three guests for the day who are experts in their chosen fields. They will introduce themselves at the start of the day and give us an overview of their areas of expertise. Then everyone will get to spend time with each of them in smaller group discussions through the day. We think it will be a very interesting day to explore the way we think about leadership in customer facing organisations. We hope it will challenge your thinking and provide some good ideas.

Our three guests all think about different aspects of leadership. Alistair Mant is well known for his study and writing on leadership and his book ‘Intelligent Leadership’ is a seminal work on the topic. Steve Simpson, author of Unwritten Ground Rules, advises leaders on how to influence the culture of their organisations. Dr Peter Ellyard, is among Australia’s leading demographers and helps leaders make sense of the trends shaping consumers and markets. We hope you will enjoy some stimulating discussions over the day and our three guests are hoping to hear from you.

Our final guest at the end of the day is Brett Godfrey who was CEO at Virgin Australia for over a decade. The airline industry has been in the news for the last six months with customer lock outs, new alliances and many changes in strategy. So we thought Brett would give us a very interesting perspective on his time at Virgin and his view of the Australian market place.

There are a number of new members to welcome to the group. We have a few new industries represented; Karen Andrews joins us from Nestle, David Ginnane from Tabcorp and Andy Berry from Fuji Xerox. Andrew Mulvogue at Suncorp and John Williams from Bankwest will be known to many of the group and Alison Crabb from Flight Centre enjoyed being a guest last year and then joined up.

Graeme Baker has moved into a new role at AMP and rejoined. Andrew Moore from Westpac will take over the reins from Harry Wendt and Mark Anning is our first member from the Northern Territory at the Territory Insurance Office. Lastly, Anthony Justice joins from IAG and Kelli Gorman joins us from outsourcer Stellar.

So please join us in welcoming these new members and we look forward to some interesting discussions over the day. For those of you new to our group, we really look forward to hearing from you in discussion.

We hope you find today both valuable and enjoyable.

Dayle, Michelle, Geoff, Andrew, Tracey and David



Agenda

Monday 21st May 2012

7:00pm – 7.30pm Quay Restaurant, The Rocks for pre-dinner drinks & canapés

7.30pm – 11.00pm Dinner in Tower Room

Tuesday 22nd May 2012

Sofitel Wentworth Sydney
Adelaide Room
61-101 Phillip Street, Sydney

8:00am Registration and Coffee

8:30am Welcome and Introductions

8:45am Opening Keynote: Alistair Mant, Peter Ellyard, Steve Simpson

9:45am Coffee recharge!

10.00am Break Out Session 1

11:15am Morning Coffee

11:45am Break Out Session 2

1.00pm Lunch

2:00pm Break Out Session 3

3:15 pm Afternoon Tea

3:30pm CEO Perspective: Brett Godfrey

4:30pm What did we learn and what next for the CCO Forum?
Closing questions and wrap up

5:00pm Meeting Close





Editorial – Secrets of Customer Facing Leaders

Leadership in the customer facing parts of business seems particularly challenging as the CCO Forum members might agree. The interactions with customers add an unpredictable dimension to the leadership challenge. The workforce is typically large and widely distributed and requires leaders to have a variety of technical and interpersonal skills. The customer facing areas also have to handle problems and issues generated elsewhere such as system failures, process slip ups or product failures. Lack of outcome control is critical and can affect staff engagement greatly. Ironically, despite these challenges, we hear that other issues like Finance and IT get more board and CEO attention! So what characteristics do the most successful customer facing leaders demonstrate?

The first we notice is that they somehow stay close to the customer despite the apparent tyranny of distance between the front line and the executive suite. To close that gap, Jeff Bezos at Amazon would log on as a front line agent each month and respond to emails. We met a Board Chairman last week who mystery shops his own company and industry peers, another who insisted on reviewing all significant negative customer feedback. James Strong told us how he used to take the Qantas exec team away with groups of customers to get their feedback in detail.

The second characteristic we note is a good understanding of the associated operational disciplines and practices. At the last CCO Forum, we saw how Bernie Brookes at Myer had an amazingly detailed knowledge of his business, to the point of understanding stock and staffing levels in each store. We are also impressed by leaders who understand how to juggle resources appropriately in order to deliver positive customer experiences. The best operational turnaround specialists know exactly which data to focus on and how to remodel their practices to be truly customer facing.

The third attribute we have seen is relentless and clear communication. Successful customer facing leaders paint a simple, picture of where the organisation is heading and how each person contributes to that journey. We worked with one effective leader who asked the front line staff to focus on just one goal. She took responsibility for everything



else but explained how this would deliver for the customer, staff and company. She made the messages very clear and repeated them at all levels for several months. The results were dramatic and staff clearly responded to this clarity of purpose and focus.

Lastly, good customer facing leaders ultimately realise it's all about people. They have that special knack to recognise great talent and surround themselves with committed professionals. Also they consciously forge links with the front line through communication and face to face meetings and reward great outcomes. The greatest leaders seem to be able to create a coaching and learning organisation that continually invests in people in the knowledge that the investment will benefit the customer and the organisation.

So we don't envy those in customer facing leadership roles as it's a tough gig but we do think many have succeeded because they closed the customer gap, understood the operations, communicated effectively and invested in their people.

David Jaffe, Graham Howard and Peter Morrison
LimeBridge Australia





Opening Keynote

Our three expert guests will kick off the day with an overview of their expertise and session topics.

Alistair Mant: Effective Leadership of Complex Systems

Alistair will explain why “leadership” has become such a pressing issue in today’s world – and why it is not an alternative to “management” but a necessary complement for anybody who wants to earn the respect and admiration of others. He will reveal the gist of all the research into complex systems which explains how and why an absence of “systems thinking” leads to embarrassing and expensive cockups and blunders – and often to the extinction of respect for leadership. He will also demonstrate how deeply satisfying and necessary is the leadership relationship in our human nature.

Peter Ellyard: The Future-Taker and the Future-Maker in Emerging 21st Century Society and Business

Peter will summarise his research on the 21st Century market place and how it is now dominated by an emerging global culture of interdependence that is embodied in a new paradigm he calls ‘planetism’. Global values shifts are shaping emerging markets and future products and services. These are determining the 70% of all products and services present in 20 years’ time that have yet to be invented. Increasing global interdependence is changing all relationships, including personal and political relationships and relationships in business with customers, suppliers and shareholders and is determining how business should be best organised for future success.

So if we want to be successful in this emerging 21st century society we will need new concepts and toolkits. Peter will describe the six processes we can use to shape the future. He will also explain the difference between the future-taker and future-maker in each of us and relate this to the manager and leader respectively in each of us. For success we need to understand these transforming global trends and position ourselves to be both a resilient future-taker and a purposeful future-maker.

Steve Simpson: Improving the Customer Facing Culture: Introducing Unwritten Ground Rules

In his introductory keynote Steve will introduce the power of understanding Unwritten Ground Rules (UGRs) as a way to understand the underlying culture of a team. Steve will use a number of examples and cases to illustrate the concepts. He will show how individual behaviour is directed and constrained by the way that individuals interpret UGRs within an organisation and in particular how UGRs drive key customer facing behaviours. He will share outcomes from world-first research into UGRs undertaken by two Australian universities.



Breakout Sessions

Alistair Mant - Doing it Well, Effective Leadership of Complex Systems

Alistair will explore with participants their own experiences and insights about being led and providing leadership in work, family and life generally. He will draw on recent research by Google into leadership behaviours and also on his recent biography of Robert Clifford (the Tasmanian inventor and entrepreneur) in order to show how thinking straight (about complexity and context), relating well, and acting powerfully and decisively are so much more important than charisma and surface plausibility when it comes to leading people and making choices about who should be rewarded and promoted.

Peter Ellyard - The Practical Realities of Being a Future Maker

Peter will discuss how values turn into markets and the types of products and services that customers will want to buy as their values systems change. He will describe methods you can use to describe and innovate products and services that haven't yet been invented, and thereby succeed by getting to the future first. He'll illustrate how we can create success by learning from the emerging demographic groups and he will illustrate his concepts from case studies in innovation and product development. He will outline a futurist's perspective on management and leadership. Discussions will also cover whether organisations are being managed or led. Lastly, if time permits, he will discuss the threat from new entrants, the necessary pro-activity required in large industry incumbents and the challenge of the separation of the "corporate centre" from the rest of the business.

Steve Simpson - What Are the Key Cultural Attributes We Need in Place for Us to be Truly Customer Focused?

In his break out discussion Steve will share the five step process that can be used to first understand and then change UGRs to improve those aspects of the culture that impact how everyone interacts with the customer. In each break out he will ask the members to reflect on their own workplace cultures and discuss success and failures in bringing about customer related cultural change. He will draw on survey material and tools that he will share with the Forum members and will illustrate the potential improvement using a case study based on a recent cultural transformation in a large Australian Retail business.





Brett Godfrey

Closing Session - CEO's Perspective

Brett Godfrey - The Inside Story on Virgin Blue

Brett Godfrey developed an innovative but 'disruptive' airline model in 1993 and spent 5 years seeking investor support. In 1999 he pitched it to Richard Branson to seek and ultimately obtain his involvement. Brett led and built Virgin Blue from inception, stepping down in 2010 after more than 10 years of operating now Australia's second largest airline. In his tail note discussion, Brett will explain the customer strategy that Virgin Blue put in place and allow us insight on some of Virgin's secret sauce. He will also describe and comment on how Virgin's main competitors reacted and the issues facing the airline industry today. Lastly, he will try and draw out comparisons and themes relevant to other industries.

Guest Speaker Biographies

Brett Godfrey – ex Virgin Australia CEO

Brett Godfrey conceptualised and wrote the business plan for what is now Virgin Australia. He was the founding Chief Executive and implemented that vision in August 2000, with two planes, two routes and 200 staff. When he stepped down in 2010 after more than a decade at the helm, Virgin was Australia's second largest carrier, with 7,000 staff, moving nearly 20 million 'guests' annually and turning over more than \$3 billion pa. He is recognised and honoured as an innovator and leader in global aviation.

The secret of his success has been an unwavering commitment to leadership and culture. It is legend in the industry that monthly he would see the 'world' through the eyes of his customers and staff; donning a check-in uniform or baggage handler overalls to work the line. He never sat at the pointy end of one of his airline's flights, always taking the very back or worst seat to ensure he truly understood what his guests experienced with a view to continuous improvement.

Brett has been awarded the Centenary Medal for his service to Tourism and Aviation, was recognised as the Australian Chief Executive of the Year by the Institute Of Customer Service and the Outstanding Chartered Accountant in Business, by the Institute of Chartered Accountants.

Today Brett is taking a break of sorts, but invests in new ideas, participates on a small number of boards and has a particular interest in several tourism assets including Makepeace Island resort at Noosa in collaboration with Richard Branson and the iconic Quamby Estate and country club in Tasmania.

Steve Simpson – Unwritten Ground Rules

Steve Simpson is an international speaker, consultant and author based in Australia. UK based e-Customer Service World have described Steve as 'Australia's leading corporate culture authority'. SOCAP in Europe have described Steve as 'the leading Australian Customer Care Guru'.



Steve Simpson



He is the creator of the globally acclaimed UGRs® concept, which is being heralded as a new and unique way to help companies understand and improve their corporate culture. Steve has worked with companies across the globe in industries including mining, health, education, banking and finance, building, motor vehicle, real estate and others.

Steve is a Past Chapter President of the Australian Customer Service Association, and he has been an evaluator in the Australian Customer Service Awards. He was an invited member of an international team studying standards of World Class Customer Care, organised through the US based SOCAP.

Steve has a Master's Degree from the University of Alberta, is the author of two books and is a contributing author to a further two books.

Alistair Mant

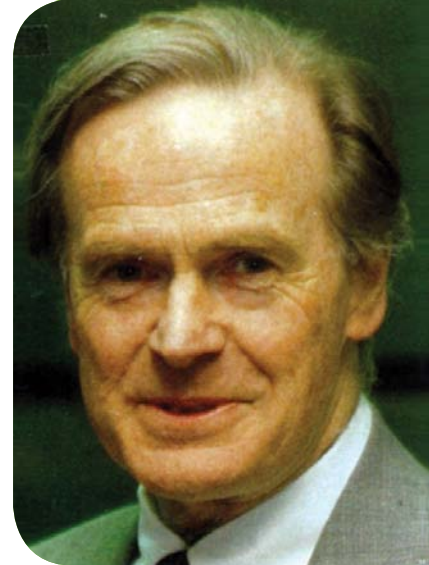
Alistair Mant is an Australian author, consultant and international authority on leadership, creativity and entrepreneurship in public and private sector organisations. He is chairman of the UK-based Socio-technical Strategy Group and also of the Performance 1 consultancy. His latest book is *"The Bastard's a Genius"* the biography of Robert Clifford, the Tasmanian entrepreneur of very fast ferries.

Dr Peter Ellyard

Peter Ellyard is Australia's most prominent futurist, and is a strategist, author and speaker. As a speaker his addresses are noted for being informative, inspiring and highly motivational. A graduate of Sydney University and of Cornell University (PhD) with a background on both physical and biological sciences, he spent 15 years as a CEO of public policy organisations including two associated with Environment and Planning, and one with Industry and Technology, and was also Chief of Staff of an Environment Minister in Canberra for three years, before formally becoming a futurist after his appointment as CEO of Australia's Commission for the Future.

Peter Ellyard is currently Chairman of the Preferred Futures Institute and the Preferred Futures Group, which he founded in 1991. He also chairs the Sustainable Prosperity Foundation and two start-up environmental companies. He is Adjunct Professor of Intergenerational Strategies at the University of Queensland, and is a Fellow of the Australian College of Educators, the Environment Institute of Australia and New Zealand, and the Australian Institute of Management. He is an elected Member of the International Union of Associations, based in Brussels, which has 45,000 international NGO members.

Peter Ellyard has been a Senior Adviser to the United Nations system for more than 30 years including to the 1992 Earth Summit where he was a senior advisor on both the climate change and the biodiversity conventions. In this he was the only Australian and one of only 20 globally. At other times he has been a senior consultant to the UNEP, UNDP and UNESCO. He has also advised the OECD over 20 years.



Alistair Mant



Dr Peter Ellyard



He has developed unique intellectual property and methodologies – a futurist’s toolkit- to assist people to understand and anticipate what the future might bring, and assist them to develop and implement visions and strategic actions to become both resilient future-takers in, and purposeful future-makers in 21st century society. Most of the job categories and products and services of 25 years hence have yet to be invented. Peter Ellyard can describe what these products and services will be. Peter envisages a global society that is prosperous, sustainable, harmonious, secure and just in the year 2050, and narrates what is being done, and can be done, to ensure its emergence. In doing this he is describing the emerging 21st century global economy.

Peter Ellyard’s most recent books are *Designing 2050: Pathways to Sustainable Prosperity on Spaceship Earth* (2008), and *Destination 2050: Concepts Bank and Toolkit for Future-Makers* (September 2011). His first book, *Ideas for the New Millennium* (1998, 2001) was an instant best-seller.

Chief Customer Officer’s Action Check List

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