



2018 Member Summit Agenda

26th Annual Member Summit: March 19-21

[Westin Verasa Napa](#), Napa, CA

Harvesting knowledge: distinguishing the fertilizer from the fruit.

Join us in Napa as we discuss the following topics:

- Agile Knowledge Management:
 - KCS Adoption best practices
 - KCS and Intelligent Swarming = Agile Knowledge Management
 - KCS Across the Organization
 - Update on Intelligent Swarming
- Predictive Customer Engagement:
 - Updates to the model
 - Customer success and effort
 - Support's role in customer retention
- AI as an Enabler:
 - Opportunities to automate KCS and Intelligent Swarming
 - Knowledge is a key enabler for AI
 - Augmenting human capability with AI to enhance the customer experience

As always we will have lots of time for networking and discussions on topics of interest to the attendees.

Agenda Overview

Monday, March 19

5:30-7 pm Welcome Reception

Tuesday, March 20

9:00-12:00 KCS and Predictive Customer Engagement Updates and Member Experiences

1:00-5:00 Breakout Tracks

- KCS Adoption in Practice
- Improving the Customer Experience

5:30 Transportation provided to Silverado Winery

6:00-9:00 Reception and Group Dinner

Wednesday, March 21

9:00-12:00 Open Space Sessions: discussions nominated by attendees

1:00-5:00 AI as an Enabler: Updates and Member Experiences

5:00 Summit adjourns



2018 Member Summit Agenda

Harvesting Knowledge: Distinguishing the Fertilizer from the Fruit

Monday, March 19

5:30 - **Welcome Reception** (*Solera Courtyard*)
7:00

Tuesday, March 20

8:00 **Breakfast** (*Solera Courtyard*)

9:00 **Welcome** (*Amphora Ballroom*)

9:15 **Overview of the Consortium's Work** - Greg Oxtan, Consortium and Jennifer Crippen, DB Kay & Associates

- The Five Initiatives
- KCS v6 Adoption Guide

9:45 **Agile Knowledge Management** - David Kay, DB Kay & Associates and John Chmaj, Verint

10:30 **Break**

10:45 **KCS Success Across the Organization** - Melissa George, Consortium and Stephane Pinault, STEP IN K

11:15 **Leveraging AI for Customer Success** - Matt Seaman, PTC

12:00 **Lunch** (*Solera Courtyard*)

Breakouts

Time	Chardonnay Sessions (<i>Amphora A</i>)	Cabernet Sessions (<i>Amphora B</i>)
1:30	"I Never Thought a KCS Adoption Could Go So Smoothly!" - Monique Cadena, Akamai	Swarming at Red Hat - Bill Ackerman, Red Hat
2:15	Break	
2:30	KCS Center of Excellence - Mike Griffiths, SAP, and Natalie Ecker, DTCC	Intelligent Swarming Panel - Adam Maino, FinancialForce and Lisa Manchester, ServiceNow and Saleem Syed, Autodesk
3:15	Break	
3:30	Advanced KCS Measures: Velocity and Impact at Blizzard - Sabrina Meditz, Blizzard Entertainment	Practical Application of AI Capabilities - Laurel Poertner and Sawan Deshpande, Coveo



2018 Member Summit Agenda

Harvesting Knowledge: Distinguishing the Fertilizer from the Fruit

- 4:30 **Adjourn**
 - 5:45 **Transportation departs for Silverado Winery**
 - 6:00 **Reception & Group Dinner**
-

Wednesday, March 21

- 8:00 **Breakfast** (*Solera Courtyard*)
- 9:00 **Open Space Set Up** (*Amphora Ballroom*)
[Open Space](#) is a facilitation technique that capitalizes on the collective experience and intellectual capabilities of those present. It is a very effective method for problem solving or defining opportunities when the outcome is not known; please bring your challenges and opportunities!
- 9:30 **Open Space Session One**
- 10:15 **Break**
- 10:45 **Open Space Session Two**
- 11:30 **Open Space Debrief**
- 12:00 **Lunch** (*Solera Courtyard*)
- 1:30 **Welcome back: Leadership Framework for Service Excellence** - Brad Smith, Vector Business Navigation
- 2:15 **Customer Engagement Models & AI** - Jim Pendergast, Matt Chinn, and Kevin Walsh, AARP Mapping AI capabilities to the customer journey
- 3:00 **Break**
- 3:15 **Artificial Intelligence Framework** - Michael Wu, PhD
- 4:15 **The Hangover: Summary and Key Takeaways**
Upcoming Events and Wrap Up
- 5:00 **Adjourn**