



# 2021 SCTC Annual Conference

San Diego | November 1- 4 , 2021

## Conference Agenda and Schedule

At the  
Wyndham  
San Diego  
Bayside Hotel

### *Tuesday Keynote:*

**The Opportunities Ahead: Helping Our Clients Thrive in Today's Changing Landscape**

#### **Brad Cleveland**

Consultant, Author and former CEO of the International Customer Management Institute (ICMI)



### *Wednesday Keynote:*

**Smart and Safe Cities: Technologies Connecting and Securing Today's Wired World**

#### **Darin Andersen**

CEO & Cofounder, NXT Robotics, Chairman & Founder, NEST CoWork, Seamless Podcast



# SCHEDULE AT A GLANCE

## MONDAY, NOVEMBER 1, 2021

9:00 AM - 3:00 PM	Tennis at Coronado
9:00 AM - 3:00 PM	Golf at Coronado
6:00 PM - 9:00 PM	Welcome Reception – Wyndham Hotel

## TUESDAY, NOVEMBER 2, 2021

7:00 AM - 8:00 AM	Breakfast and Networking – Wyndham Hotel
8:00 AM - 9:00 AM	Welcome and Introductions - <i>with Chuck Vondra, Communication Strategies</i>
9:00 AM - 9:50 AM	Keynote -The Opportunities Ahead. Helping Our Clients Thrive in Today's Changing Landscape - <i>Brad Cleveland</i>
9:50 AM - 10:05 AM	Break
10:05 AM - 10:25 AM	Sponsored Session - Sharpen
10:25 AM - 11:00 AM	Could AI Really Replace your Contact Center agents? <i>Robert Lee Harris, Communications Advantage, Inc.</i>
11:00 AM - 11:20 AM	Sponsored Session - Mitel Inc.
11:20 AM - 11:35 AM	How to Use Video to Drive Traffic to Your Web and Social Media Sites <i>Robert Cassard, Voodoo Marketing</i>
11:35 AM - 12:15 PM	AEX Consultant Panel Discussion - <i>Denise Munro, CRG Telecom Inc</i>
12:15 PM - 1:20 PM	Lunch – Wyndham Hotel
1:20 PM - 2:15 PM	Technology Leadership Panel - <i>Chuck Vondra, Communication Strategies</i>
2:15 PM - 2:35 PM	Sponsored Session - Twilio ,
2:35 PM - 3:10 PM	911 Calls, Remote work and Beyond the PBX - <i>Mark Fletcher, 911Inform</i>
3:10 PM - 3:25 PM	Break
3:25 PM - 4:00 PM	Making Contact Center Data Actionable with Active Call Resolution <i>Aaron Feinberg, Centricity and Ric Kosiba, Sharpen</i>
4:00 PM - 4:20 PM	Sponsored Session - Avaya, Inc.
4:20 PM - 4:55 PM	The Move to UCaaS and CCaaS - Tales from the Trenches <i>Elizabeth English, EE and Associates, LLC</i>
4:55 PM - 5:00 PM	Wrap Up / Announcements
5:00 PM - 6:00 PM	Free Time
6:00 PM - 8:30 PM	VAC Dinner – Wyndham Hotel
8:30 PM - 10:00 PM	SIP Tones

## WEDNESDAY, NOVEMBER 3, 2021

7:00 AM - 7:45 AM	<b>Morning Fitness Activity</b>
7:00 AM - 7:45 AM	<b>Improvisation Techniques for Consultants (Alternate AM Activity)</b> <i>Roberta J Fox, 911 Tech Advisors, div. of FOX GROUP Technology</i>
8:00 AM - 9:00 AM	<b>Breakfast and Networking – Wyndham Hotel</b>
9:00 AM - 9:50 AM	<b>Keynote - Smart and Safe Cities: Technologies connecting and Securing Today's Wired World</b> <i>Darin Andersen, CyberTECH</i>
9:50 AM - 10:10 AM	<b>Sponsored Session - Vertical Communications,</b>
10:10 AM - 10:30 AM	<b>Break</b>
10:30 AM - 10:50 AM	<b>Sponsored Session - ConvergeOne</b>
10:50 AM - 11:25 AM	<b>The 5 Keys to Public Sector Success</b> <i>David Duhn, Sourcewell, formerly NJPA</i>
11:25 AM - 11:45 AM	<b>Sponsored Session - Extreme Networks</b>
11:45 AM - 1:15 PM	<b>Lunch and Regulatory Review</b> <i>Martha Buyer, Law Offices of Martha Buyer, PLLC</i>
1:15 PM - 1:50 PM	<b>Speed Networking - Facilitator: Barb Grothe, Barb Grothe &amp; Associates</b>
1:50 PM - 2:10 PM	<b>Sponsored Session - Vonage</b>
2:10 PM - 2:30 PM	<b>Break/Transition</b>
2:30 PM - 4:15 PM	<b>Business Meeting/Elections</b>
4:15 PM - 5:15 PM	<b>Free Time</b>
5:15 PM - 9:30 PM	<b>Dinner Cruise – Hornblower Cruises, San Diego Harbor</b>

## THURSDAY, NOVEMBER 4, 2021

7:30 AM - 8:30 AM	<b>Breakfast and Networking</b>
8:30 AM - 8:50 AM	<b>Sponsored Session - Bandwidth</b>
8:50 AM - 9:25 AM	<b>Speed Networking - Facilitator: Barb Grothe, Barb Grothe &amp; Associates</b>
9:25 AM - 10:05 AM	<b>Agents: Friend or Foe - How to Respond to the "New" Competition</b> <i>Stephen M. Leaden, Leaden Associates, Inc. and BCStrategies.com Expert</i>
10:05 AM - 10:35 AM	<b>Break</b>
10:35 AM - 10:55 AM	<b>Consultants, Customer Success, and Driving Better Outcomes</b> <i>Joe Rubio, Genesys</i>
10:55 AM - 11:30 AM	<b>From Project Management to Project Oversight - The Essential Pivot</b> <i>Communication Strategies Team</i>
11:30 AM - 12:00 PM	<b>Locknote - Jon Arnold, J Arnold &amp; Associates</b>
12:00 PM - 12:10 PM	<b>Raffle</b>
12:10 PM - 1:00 PM	<b>"Brown Bag" lunch – Wyndham Hotel</b>

# SCTC San Diego Conference Sessions

**Monday, November 1, 2021**

**9:00 AM to 3:00 PM - Golf**

Coronado is such a beautiful part of San Diego, and if you play, you will not want to miss this! Coronado is ranked #5 for Best Golf Value in the nation by Golf Digest. So, join us in San Diego and sign up for the golf event, no prior experience required! Rentals are available!

**9:00 AM to 3:00 PM - Tennis**

Tennis at Coronado Island on the same day/time as Golf.

**6:00 PM to 9:00 PM - Welcome Reception**



**Tuesday, November 2, 2021**

**7:00 AM to 8:00 AM - Breakfast and Networking**

**8:00 AM to 9:00 AM - Welcome and Introductions with Chuck Vondra - SCTC President**

**9:00 AM to 9:50 AM - Keynote: The Opportunities Ahead: Helping Our Clients Thrive in Today's Changing Landscape**



Enormous changes are happening within organizations; changes that impact customer expectations, products and services, customer service and support, and even where and how employees work. Many organizations have launched efforts to address these changes with technology initiatives often labeled as “customer experience”, “digital transformation”, or “simplification”. Despite these labels, these initiatives often fall short of expectations.

**Join Brad Cleveland**, an SCTC member for over three decades who is known globally as one of today's foremost experts in customer strategy and management. In the opening keynote, Brad will identify key trends, and how independent consultants with a variety of specialties are needed now more than ever to help our clients thrive in today's changing landscape.

***Each attendee will receive a copy of Brad's book, *Leading the Customer Experience*.***

**9:50 AM to 10:05 AM - Break**

**10:05 AM to 10:25 AM - Sponsored Session - Sharpen**

**10:25 AM to 11:00 AM - Could AI Really Replace your Contact Center agents?**

Specialized A.I. systems with repeatable tasks have revolutionized processes everywhere from the medical industry to mining, but could an AI system ever really duplicate human consciousness? What do we actually know about the human mind? Some say AI will "take over the world" while others say "It can never happen". Would you bet your customer service strategy on what you believe about the human mind?

***SPEAKER: Robert Lee Harris - President, Communications Advantage, Inc.***

**11:00 AM to 11:20 AM - Sponsored Session - Mitel Inc.**

**11:20 AM to 11:35 AM - How to Use Video to Drive Traffic to Your Web and Social Media Sites**

***Robert Cassard, Voodoo Marketing***

### **11:35 AM to 12:15 PM - AEX Consultant Panel Discussion**

The Audit and Expense Management Special Interest Group will present a panel discussion on current topics impacting cost reduction and expense management.

*Moderator: Denise Munro - Principal, CRG Telecom Inc*

### **12:15 PM to 1:20 PM - Lunch**

### **1:20 PM to 2:15 PM - Technology Leadership Panel**

The SCTC welcomes local IT decision makers for this interactive panel to discuss current issues and trends in Enterprise and Institutional technology.

*MODERATOR: Chuck Vondra - SCTC President, Principal, Communication Strategies*

*PANELISTS: Shirin Alipanah - Principal, Avasant*

*Roberta French - Director of IT Operations, WD-40 Company*

*DJ Weed - Associate Director, IS Business Partner, Greenwich Biosciences*

### **2:15 PM to 2:35 PM - Sponsored Session - Twilio**

### **2:35 PM to 3:10 PM - 911 Calls, Remote work and Beyond the PBX**

Federal legislation covers remote workers for 911 access. Out of the 240 million 911 calls each year, more than 80% originate from cellular devices. The session will present new and innovative tactics for definitively providing proper routing to any 911 center utilizing a new Dynamic Location Reporting capability and how new technology can alert the Enterprise when a 911 from any cell phone originates within their defined Geo fence boundary .

*SPEAKER: Mark Fletcher - Mark Fletcher, Vice President Public Safety Solutions, 911Inform*

### **3:10 PM to 3:25 PM - Break/Transition**

### **3:25 PM to 4:00 PM - Making Contact Center Data Actionable with Active Call Resolution**

Modern contact center leaders are swimming in data, but what are they doing with the sea of information coming in? Join Aaron Feinberg and Ric Kosiba for a tour of how Centricity turns data into action using modern metrics like Active Call Resolution. They'll explain how to measure ACR and what to do with it to make the data operationally actionable. And then, they'll show you how Centricity is using it to create jaw-dropping results in terms of agent efficiency and CSAT scores.

*SPEAKER: Aaron Feinberg - VP of Operations, Centricity and Ric Kosiba - Chief Data Scientist, Sharpen*

### **4:00 PM to 4:20 PM - Sponsored Session - Avaya, Inc.**

### **4:20 PM to 4:55 PM - The Move to UCaaS and CCaaS - Tales from the Trenches**

The overnight deployment of work from home initiatives to support exponentially exploding interactions during the pandemic resulted in unexpected consequences for many organizations. Join us for an entertaining look at real world experiences from pandemic-fueled contact center interactions and how technology and quick thinking improved efficiency, quality and overall effectiveness of interactions.

*SPEAKER: Elizabeth English - Founder and Principal, EE and Associates, LLC*

### **4:55 PM to 5:00 PM - Wrap Up / Announcements**

### **5:00 PM to 6:00 PM - Free time**

## **6:00 PM to 8:30 PM – Vendor Advisory Council Networking Dinner**

### **8:30 PM to 10:00 PM - SIP Tones**

Music, Song and Dance by the SCTC's very own house band, the SIP Tones!



# SCTC San Diego Conference Sessions

**Wednesday, November 3, 2021**



**7:00 AM to 7:45 AM - Morning Fitness Activity OR  
7:00 AM to 7:45 AM - Improvisation Techniques for Consultants  
(Alternate AM Activity)**

This 30 minute session will enable consultants to use her most effective improvisation techniques to help project teams work together more successfully (whether virtual or face-to-face).



*Instructor: Roberta J Fox - Chief Innovation Officer, 911 Tech Advisors, div. of FOX GROUP Technology*

**8:00 AM to 9:00 AM - Breakfast and Networking**

**9:50 AM to 10:10 AM - Sponsored Session - Vertical Communications**

**9:00 AM to 9:50 AM – Keynote by Darin Andersen**

**Smart and Safe Cities: Technologies Connecting and Securing Today's Wired World**

Today's cities and organizations located within cities are generating increasingly complex technology scenarios as they try to bring together good technology, process, and cybersecurity to meet complex problems. Join Darin Andersen as he examines how artificial intelligence, automation and robotics are all leading technologies aimed to empower new products and services to enable greater productivity and progress in a safe and cost-effective manner.



**Darin Andersen** is a distinguished Internet of Things (IoT) and cybersecurity professional with over 20 years of experience in the industry. Darin is currently the senior executive at CentrexIT, a national IT service provider and is Chairman of NXT Robotics Corp., which he Cofounded in 2017. Darin received the 2013 Securing Our eCity Innovation Award, Exemplary Performance Award for Cyber Security by San Diego Business Journal. Darin received an MBA in Finance and Operations Management and 2nd Masters in Information Systems and Operations Systems both from University of Southern California.

**10:10 AM to 10:30 AM - Break**

**10:30 AM to 10:50 AM - Sponsored Session - ConvergeOne**

**10:50 AM to 11:25 AM - The 5 Keys to Public Sector Success**

The public sector provides a tremendous opportunity, but with its own set of rules that can drive bad outcomes/ decisions. Learn how to help these entities get what they want in a compliant way. Sourcewell provides \$5 billion in contract solutions to public agencies every year!

**SPEAKER: David Duhn - Supplier Development Supervisor, Sourcewell formerly NJPA**

**11:25 AM to 11:45 AM - Sponsored Session - Extreme Networks**



**11:45 AM to 1:15 PM Lunch and Regulatory Review**

Join Telecom Attorney Martha Buyer during this lively and informative lunchtime session covering the latest legal and regulatory issues in technology and telecom law. **SPEAKER: Martha Buyer - Principal, Law Offices of Martha Buyer, PLLC**

**1:15 PM to 1:50 PM - Speed Networking**

Get to know consulting colleagues through this fast paced, facilitated networking session.

**FACILITATOR: Barb Grothe, Barb Grothe & Associates**

**1:50 PM to 2:10 PM - Sponsored Session - Vonage**

## 2:30 PM to 4:15 PM - Business Meeting/Elections

The SCTC's annual meeting and election of Board of Directors and Officers. **Consultant members only.** The Vendor Advisory Council will conduct concurrent meeting and elections.



## 4:15 PM to 5:30 PM - Free time

## 5:15 PM to 9:30 PM - Dinner Cruise!

All aboard for a dinner and evening tour of the beautiful San Diego Harbor. Register in advance, then meet at Hornblower Cruises, just a short walk from the hotel lobby!



# Thursday, November 4, 2021

## 7:30 AM to 8:30 AM - Breakfast and Networking

## 8:30 AM to 8:50 AM - Sponsored Session - Bandwidth

## 8:50 AM to 9:25 AM - Speed Networking

Get to know consulting colleagues through this fast paced, facilitated networking session.

**FACILITATOR: Barb Grothe, Barb Grothe & Associates**

## 9:25 AM to 10:05 AM - Agents: Friend or Foe. How to Respond to the "New" Competition

Agents are now a key sales channel for multiple UCaaS and CCaaS vendors. According to one vendor, up to 80% of all new cloud leads come through agents. Agents don't require technical skill sets and have been trained to present themselves as 'independent' consultants because they can offer multiple vendors and "no cost" consulting as a part of their 'spin'. Take away from this session an understanding of agent compensation models, the real threat of competing against an agent, how to make valid arguments for true independent consulting, and how you can work with agents and leverage a possible relationship and your expertise.

**SPEAKER: Stephen M. Leaden - , Leaden Associates, Inc. and BCStrategies.com Expert**

## 10:05 AM to 10:35 AM - Break

## 10:35 AM to 10:55 AM - Consultants, Customer Success, and Driving Better Outcomes

**SPEAKER: Joe Rubio -,Sr. Customer Success Manager, Genesys**

## 10:55 AM to 11:30 AM - From Project Management to Project Oversight- the Essential Pivot

Most consulting opportunities involve three basic phases, Assessment, selection and deployment. Com-Strat's experience is that the third phase is the most lucrative, and also the hardest to sell. Com-Strat will share its experience in successful techniques to position the consultant to win these phases and how to pivot from project management to project oversight and the SME role.

**SPEAKER: Communication-Strategies Team**

## 11:30 AM to 12:00 PM - Locknote: Jon Arnold - Principal, J Arnold & Associates

Jon Arnold is Principal of J Arnold & Associates, an independent analyst practice providing thought leadership and go-to-market counsel, with a focus on the business-level impact of digital transformation on the future of work. He serves as an Advisor to emerging technology/telecom companies, is a board member of the U.S.-based SCTC, and an Advisory Council member for UK-based UCX.



## 12:00 PM to 12:10 PM - Raffle

## 12:10 PM to 1:00 PM - "Brown Bag" lunch

# General Information

## Conference Registration

**Early bird discount ends 9/30/21!**

Register at: <https://sctc.memberclicks.net/2021sctc#/>

Full Conference Registration Fees	Early Bird Price (Ends 09/30/2021)	Standard Conference Rates
SCTC Consultants	\$750.00	\$850.00
Full VAC Members	\$1200.00	\$1200.00
Regional VAC Members	\$3000.00	\$3000.00
Non-Member Consultants	\$750.00	\$850.00
Non-Member VAC	\$3200.00	\$3200.00

## Golf and Dinner Cruise

Golf (Additional \$60 fee to rent the clubs)	\$88.00
SCTC Members - Sunset Dinner Cruise	\$40.00
Guests - Sunset Dinner Cruise	\$80.00

Because of uncertainty related to conferences and travel, the SCTC is offering a relaxed refund policy this year. Requests to withdraw must be made in writing and received by SCTC HQ on or before October 11, 2021 for a full refund, and on or before October 31, 2021 for a full refund with a \$50.00 administrative fee. If the annual conference is cancelled, the SCTC will offer a full refund.

## Meals

### Conference registration includes:

- Monday night reception,
- Tuesday Continental Breakfast, Lunch and Dinner,
- Wednesday Continental Breakfast and Lunch
- Thursday Continental Breakfast and Brown bag Lunch

## Safety and Social Distancing

- California State currently requires masks for all unvaccinated meeting guests, and strongly suggests mask wearing for vaccinated guests.
- Wyndham Hotels have taken extra measures to ensure the safety of guests, including enhanced social distancing in meeting and public spaces, frequent cleaning of high touch areas and extended rest periods between hotel check-ins.

See complete information at:

<https://www.wyndhamhotels.com/about-us/count-on-us>

## Hotel Reservations

### Wyndham San Diego Bayside

1355 North Harbor Drive  
San Diego, CA 92101

### Discounted Rates:

Single/Double - \$199.00  
Triple - \$219.00  
Quad - \$239.00



**To Make your Reservation Please Call the Hotel at 1-877-999-3223**

Group Name: **SCTC Conference 2021**  
or book online at

<https://book.passkey.com/event/50197181/owner/55596/home>

*\*Final day to make reservations is October 8, 2021 at 5:00 p.m. PST.*

### Additional Information:

Check In: 4:00 P.M.  
Check Out: 12:00 P.M.

### Room Rate Includes:

- Complimentary airport shuttle for San Diego Intl. Airport (shuttle departs every fifteen minutes from 5:00 a.m. - 9 a.m., then every half hour from 9:00 a.m. - 12 a.m.)
- Complimentary WI-FI in all guestrooms
- Complimentary coffee and tea service in each guest room
- Admission and use of fitness center facilities
- Complimentary shuttle to the San Diego Zoo, Seaport Village & Horton Plaza (Scheduled times, daily)
- Complimentary newspaper provided on each floor lobby (USA Today, Monday-Friday)