



## SPECIAL INTEREST GROUP CHARTER

**SIG Name:** Business-to-Business (B2B) Customer Service Special Interest Group

### Intended Participants

- **Companies:** Product manufacturers or distributors that sell to business customers (e.g., commercial/industrial end users, retailers, distributors, brokers or wholesalers) and that have a customer service organization dedicated to supporting business customers
- **Roles:** Senior leaders of business-to-business (B2B) customer service organizations (vice presidents, directors, senior managers)

### SIG Goals

SIGs are forums for those with essentially the same level of responsibility for a specific business function or process (peers at other companies) to engage in in-depth discussion and benchmarking around particular facets of that function or process over the course of several sessions. SIGs fill the gap between UWEBC Peer Groups, which discuss a different topic at each meeting, and Member-to-Member Advising, where individual companies connect to share information on highly specialized, company-specific topics.

**The goals of the B2B Customer Service SIG are:**

- To provide a forum for senior leaders of B2B customer service organizations to discuss topics of shared interest related to managing and optimizing the performance of their organizations
- To enable participants to glean leading practices to improve/enhance the efficiency and effectiveness of their customer service operations by learning about the strategies, practices and processes utilized by other companies providing customer service in a B2B environment
- To foster participants' development of a network of B2B service leader peers at other UWEBC member companies

### SIG Steering Committee

- Alex Goldberg, Customer Experience Manager – Snap-on
- Sherri Jasinski, Customer Support Director – ORBIS Corporation
- Barbara Neumann, Technical Product Support, Training and Customer Systems Manager – Ariens Company
- James Shanholtzer, Dealer Support Operations Manager – CNH Industrial
- Mark Wagner, Customer Supply Chain Solutions Manager – Kimberly-Clark

### Number of Meetings, Frequency, Length and Location

- The SIG will meet four times per year (quarterly) in 2017 and 2018. Additional meetings may be scheduled if there is continued interest from a critical mass of participants.
- Meetings will be from 9:00am-3:00pm and will normally take place on the UW-Madison campus

### Participant Expectations

- Each company participating in the SIG will designate a senior customer service leader as its "Primary Participant" in the group.
- The Primary Participant should attend as many of the meetings as reasonably possible (dates will be provided after the first meeting).
- In the event the Primary Participant is unable to attend a meeting, a representative may be designated for that meeting. However, in order to maintain the integrity of the peer forum, **participation in the SIG may not be permanently delegated to a lower level employee.**
- Depending on the practice/topic of focus for a particular meeting, the Primary Participant may bring along a team member with specific expertise/responsibility for that practice/topic in their organization.

### Topics for Practice-Sharing Discussions

- (The SIG met six times in 2016. Past discussion topics and notes can be accessed [here](#))
- Providing differentiated customer service / customer segmentation practices
- Knowledge management strategies and practices
- CSR career-pathing models and practices
- CSR compensation and incentive models and practices
- Attracting, recruiting and hiring customer service associates
- Training and development practices for associates
- Customer self-service capabilities and practices
- "Show and tell" of participants' customer portals
- Process automation use cases and experiences
- How participants use their CRM systems
- Selling senior leadership on investments in CS technology
- Interfacing, collaborating and communicating with other internal functions