

# Customer Service Workshop

Co-Hosted with Chicago TPF

June 22-24, 2026



## Preliminary Agenda

Monday, June 22	
6:30 p.m. (ET)	Welcome Reception and Dinner at JW Marriott Chicago
Tuesday, June 23	
7:30 a.m. (ET)	Group Breakfast (JW Marriott)
8:30 a.m.	Meet in Lobby; transportation will be provided to Chicago TPF
8:45 – 9:00 a.m.	<b>Welcome from the National Council on Teacher Retirement &amp; Chicago TPF</b> <ul style="list-style-type: none"><li>• <i>Dean Kenderdine, Executive Director, NCTR</i></li><li>• <i>Carlton Lenoir, Executive Director, Chicago TPF</i></li><li>• <i>Robyn Wheeler, Assistant Executive Director, NCTR</i></li></ul>
9:00 – 10:30 a.m.	<b>Introductions and General Roundtable Discussion</b>
10:30 – 10:45 a.m.	Break
10:45 – Noon	<b>Federal Relations Update</b>  <i>Presented by: Leigh Snell, Government Relations Director NCTR</i>  An update on key federal policy and legislative developments impacting public retirement systems, including current issues, upcoming <b>ADA compliance deadlines</b> , and emerging <b>federal AI laws and regulations</b> . The session highlights practical implications and preparation strategies for systems navigating these changes.
Noon – 1:00 p.m.	Group Lunch (Chicago TPF)
1:00 – 1:45 p.m.	<b>AI isn't coming—it's already here, and retirement systems are finding smart, practical ways to put it to work.</b> <i>Presented by:</i> <ul style="list-style-type: none"><li>• <i>Winston Buckley, Director of Communications &amp; Outreach, Georgia TRS</i></li><li>• <i>Erric Diaz, Chief AI Officer, New York City TRS</i></li></ul> In this fast-moving, idea-packed session, presenters share real-world examples of how AI is streamlining operations, strengthening communications, and enhancing the member experience, highlighting practical uses, lessons learned, and ideas you can take back to your own system.

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Tuesday, June 23 (continued)	
1:45– 2:45 p.m.	<p><b>Group Discussion: Using Data to Get Ahead—Predictive Insights for Proactive Member Service</b></p> <p>Member service doesn't have to wait for problems to surface. In this interactive group discussion, participants will explore how retirement systems are using predictive analysis to spot trends, anticipate member needs, and address issues sooner. The focus is on practical, real-world applications, how data insights can shift service models from reactive problem-solving to proactive, member-focused support that improves both outcomes and experience.</p>
2:45 – 3:30 p.m.	System Tour
3:30 p.m.	<b>Wrap up of Day One</b>
5:30 p.m.	Meet in hotel lobby for transportation to dinner
6:30 p.m.	Group Dinner (offsite)
Wednesday, June 24	
7:30 a.m. (ET)	Group Breakfast (JW Marriott)
8:30 a.m.	Meet in Lobby; Transportation provided to Chicago TPF
9:00 – 9:30 a.m.	<p><b>Meet the Peacock</b> Introductions and short networking among the group</p> <p><i>Presented by: Julie Lapourese, Screaming Peacock</i></p>
9:30-10:00 a.m.	<p><b>Mindfulness Reset</b></p> <p>In this session, Screaming Peacock partners with mindfulness expert Rachel Tenenbaum to explore mindfulness as a practical professional advantage, not a luxury. Participants walk away with:</p> <ul style="list-style-type: none"><li>• Greater awareness of how their mind operates under pressure</li><li>• Tools to interrupt reactivity earlier</li><li>• A practical way to reset and refocus during the day</li><li>• A felt experience of what “clear” actually feels like</li></ul> <p><i>Presented by: Rachel Tenenbaum, Screaming Peacock Partner</i></p>
10:00-11:00	<p><b>The Hater's Guide to Geezers, Punks and Chatbots</b></p> <p>Do you want to remain a human business? It's the essential question of the era. We'll journey through the evolution of generations, life stages, technology, and your company as you learn how to ensure the humans in your workplace feel valued and that you get the most value from them - harmoniously welding Human Intelligence, HI, with AI.</p> <p><i>Presented by: Julie Lapourese, Screaming Peacock</i></p>
Wednesday, June 24 (continued)	

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<b>11:15 - Noon</b>	<b>But We Have Always Done It That Way!</b>  Do you want to remain a human business? It's the essential question of the era. We'll journey through the evolution of generations, life stages, technology, and your company as you learn how to ensure the humans in your workplace feel valued and that you get the most value from them - harmoniously welding Human Intelligence, HI, with AI.  <i>Presented by: Julie Lapourese, Screaming Peacock</i>
<b>Noon</b>	<b>Lunch</b>
<b>1:00 – 2:30 p.m.</b>	<b>The Art and Science of Customer Success</b>  Experience working with your team through the eyes of your customer. We'll physically map out the path, stops, and decision points your customers take as they make their way through your sales funnel and workflows and discuss what excellence looks like and how to mitigate friction your customers might encounter along the way.  <i>Presented by: Julie Lapourese, Screaming Peacock</i>
<b>2:30 -2:45 p.m.</b>	<b>Break</b>
<b>2:45 – 3:15 p.m.</b>	<b>Managing Up: The Smart Strategy for Getting Things Done</b>  Managing up is not sucking up; it's smart strategy. It's about communicating with purpose, influencing with confidence, and building the kind of professional relationship that gets things done (and gets you noticed). This session flips the old hierarchy on its head. You'll learn how to navigate personalities, anticipate needs, and create partnerships that work both ways — because leadership isn't just top-down anymore. It's 360-degrees of clarity, courage, and connection.  <i>Presented by: Julie Lapourese, Screaming Peacock</i>
<b>3:15 – 3:45 p.m.</b>	<b>Wrap Up for the Day</b>  Over the past three days, we've explored how data, AI, and human insight come together to redefine modern member service and leadership. As we close, we'll reflect on key takeaways and commit to what comes next, each participant identifying one action they will take to improve the member experience, because systems don't deliver great member service, leaders do.
	Dinner on your own