



FORRESTER®

# CX Summit North America

## Nashville & Digital

June 17, 2024 – June 20, 2024

In-person Agenda

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**Bold Starts: Monday, Jun 17**

2:00 pm – 5:00 pm CDT	<b>Forrester Women's Leadership Program</b>  <b>2:00 pm   Arrival, Coffee &amp; Networking</b>  <b>2:25 pm   Fireside Chat: Innovation, Authenticity, And Leadership In The Age Of AI</b> Speakers: Emily Collins, VP, Research Director, Forrester Cory Munchbach, Chief Executive Officer, BlueConic  <b>2:55 pm   Roundtable Discussions</b>  <b>3:15 pm   Panel: Empowering Women in AI: Navigating CX, UX, and D&amp;I for a Future of Inclusivity</b> Speakers: Kim Herrington, Senior Analyst, Forrester Fadjanie Cadet, Director, Diversity & Inclusion, Forrester Christie Sandoval, Senior Vice President, Customer Experience, T-Mobile  <b>4:00 pm   Break</b>  <b>4:15 pm   Community Roundtables</b>  <b>6:00 pm   Networking Reception</b>
2:30 pm – 5:00 pm CDT	<b>First Look: The US Health Insurers Customer Experience Index, 2024</b> Speakers: Judy Weader, Principal Analyst, Forrester Arielle Trzcinski, Principal Analyst, Forrester
2:30 pm – 5:00 pm CDT	<b>Workshop: Make Sure Your CX Capabilities Are Mission-Ready</b> Speakers: Su Doyle, Senior Analyst, Forrester Kara Hoisington, Principal Consultant, Forrester
3:00 pm – 5:00 pm CDT	<b>Forrester CX Summit Certification: Take A Human + AI Approach To CX</b> Speakers: Max Ball, Principal Analyst, Forrester Patrick Hayes, Product Manager, Certification, Forrester
5:15 pm – 6:00 pm CDT	<b>Musical Experience: Team Anthem</b>
6:00 pm – 7:00 pm CDT	<b>Welcome Reception</b>
6:30 pm – 7:30 pm CDT	<b>Executive Leadership Exchange (Invite-Only): Networking Reception: Meet Your Peers</b>

**Tuesday, Jun 18**

8:30 am – 9:30 am CDT	<b>General Breakfast</b>
9:30 am – 9:40 am CDT	<b>Opening Remarks</b> Speakers: Sharyn Leaver, Chief Research Officer, Forrester
9:40 am – 10:10 am CDT	<b>Keynote: Forge Boundless Experiences With Humans + AI</b> Speakers: J.P. Gownder, VP, Principal Analyst, Forrester
10:15 am – 10:45 am CDT	<b>Guest Speaker</b>
10:50 am – 11:30 am CDT	<b>Marketplace Coffee Break &amp; Networking (In-Person Only)</b>  <b>10:50-11:00am - BlastX: Building Brand Loyalty with Zero-Party Data</b> Speakers: Brian McIntosh, Chief Consulting Officer, BlastX Consulting  <b>11:05-11:15am - Forethought: Driving CX Excellence with AI: Practical Insights for Leader</b> Speakers: Deon Nicholas, Co-founder, CEO, Forethought  <b>11:20-11:30am - SurveyMonkey: How Golden State Warriors Shoot &amp; Score on NPS</b> Speakers: Sofia Knutson, Senior Solutions Engineer, SurveyMonkey
10:50 am – 12:05 pm CDT	<b>Skill Building Workshop   Storytelling Essentials: Discovering your Roles, Goals, and Values.</b> Speakers: Kim Herrington, Senior Analyst, Forrester

Tuesday, Jun 18

11:35 am – 12:05 pm  
CDT

Breakout Sessions		
<div>THE FUTURE OF HUMANS + AI</div> <div>Five Steps For Building Differentiation With GenAI</div> <div>Speakers: Rowan Curran, Senior Analyst, Forrester</div>	<div>ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE</div> <div>Panel: Analytically-Driven CX Improvement</div> <div>Speakers: Brandon Purcell, VP, Principal Analyst, Forrester Dr. Brita Andercheck, Chief Data Officer and Director of the Office of Data Analytics and Business Intelligence, City of Dallas Aniket Navalkar, Vice President, Survey &amp; Insights, Advocate Health Kerry Sette, Vice President of Consumer Research and Insights, Voya Financial Julie Rickis, Head of CX Development, MassMutual</div>	<div>HUMAN-CENTERED, AI-READY LEADERSHIP</div> <div>Are You A Better Boss Than A Bot? Level Up Your Leadership Skills For An AI-Infused World</div> <div>Speakers: Katy Tynan, VP, Principal Analyst, Forrester</div>
<div>BETTER TOGETHER: CX + DIGITAL + MARKETING</div> <div>Align And Activate For Amazing Experiences</div> <div>Speakers: AJ Joplin, Senior Analyst, Forrester</div>	<div>AI EVERYWHERE?</div> <div>Impact Customer Outcomes with AI Powered Digital Experiences</div> <div>Speakers: Chuck Gahun, Principal Analyst, Forrester</div>	<div>DELIVER EXPERIENCES AT DIGITAL SPEED</div> <div>No Experience Is The Most Convenient Experience</div> <div>Speakers: Joe Stanhope, VP, Principal Analyst, Forrester Jessica Liu, Principal Analyst, Forrester</div>
<div>THE GENAI TRUST IMPERATIVE</div> <div>Don't Get Canceled: Overcoming GenAI Consumer Backlash</div> <div>Speakers: Audrey Chee-Read, Principal Analyst, Forrester</div>		

Tuesday, Jun 18

12:10 pm – 12:40 pm CDT	<b>Case Study Sessions (In-Person Only)</b>  <b>Acxiom Case Study</b>  <b>Concentrix: Learning from Leaders: Solving Persistent CX Challenges</b> Speakers: Kaitlen Elmore, Sr. Director, Voice of the Customer Programs, Concentrix Jack Pursley, Sr. Director, Voice of the Customer Programs, Concentrix Charles Bates, Manager, Business Operations Services (BOS) Customer Care Group, American Honda Finance Corporation (AHFC) Andy Rieger, Sr. CX Manager, Hill's Pet Nutrition  <b>FullStory Case Study</b>  <b>NICE: AI in Action: Real Results and Innovation in ONE's CX Strategy</b> Speakers: Kristie O'Donnell, Director, Product Pre-Sales, Nice  <b>Observe.AI: Gen AI-based conversation intelligence with human-centric controls.</b> Speakers: Milind Pansare, VP Product, Observe.AI Claudia Lee, Sr.Product Manager, Observe.AI
12:50 pm – 1:55 pm CDT	<b>Lunch &amp; Marketplace (In-Person Only)</b>
12:50 pm – 1:55 pm CDT	<b>12:50-1:55pm CDT   Lunch &amp; Learn Session (In-Person Only)</b>  <b>Lunch &amp; Learn with Medallia</b>
12:50 pm – 1:45 pm CDT	<b>Executive Leadership Exchange (Invite-Only): Exclusive Lunch with Analyst-Led Topic Tables</b> Speakers: Jonathan Roberts, Senior Analyst, Forrester David Johnson, Principal Analyst, Forrester Katy Tynan, VP, Principal Analyst, Forrester Audrey Chee-Read, Principal Analyst, Forrester Sucharita Kodali, VP, Principal Analyst, Forrester Brandon Purcell, VP, Principal Analyst, Forrester Su Doyle, Senior Analyst, Forrester

Tuesday, Jun 18

2:05 pm – 2:35 pm  
CDT

Breakout Sessions		
<b>THE FUTURE OF HUMANS + AI</b> <b>Design Your AI Customer Service Strategy</b> Speakers: Christina McAllister, Senior Analyst, Forrester	<b>ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE</b> <b>Use Your AI Mojo To Conjure CX ROI</b> Speakers: Pete Jacques, Principal Analyst, Forrester	<b>HUMAN-CENTERED, AI-READY LEADERSHIP</b> <b>The CMO's Role In Leading AI Adoption</b> Speakers: Mike Proulx, VP, Research Director, Forrester Norm Yustin, Yustin, Russell Reynolds Associates
<b>BETTER TOGETHER: CX + DIGITAL + MARKETING</b> <b>Customer-Focused Orgs Are Aligned, Defined, Fluid, And Fast</b> Speakers: Shar VanBoskirk, VP, Principal Analyst, Forrester	<b>AI EVERYWHERE?</b> <b>When Machines Get Creative</b> Speakers: David Truog, VP, Principal Analyst, Forrester	<b>DELIVER EXPERIENCES AT DIGITAL SPEED</b> <b>When Machines Are More Empathetic</b> Speakers: Senem Guler Biyikli, Analyst, Forrester
<b>THE GENAI TRUST IMPERATIVE</b> <b>The Seven Habits Of Highly Trusted Artificial Intelligence</b> Speakers: Brandon Purcell, VP, Principal Analyst, Forrester		

Tuesday, Jun 18

2:45 pm – 3:15 pm  
CDT

**Case Study Sessions (In-Person Only)**

**Callminer: Calibrating NPS with AI to REALLY understand customers**

Speakers: Jim Conner, Director of Operations, Gant Travel M.J. Johnson, Sr Director of Product Marketing , CallMiner

**CSG: Navigating the New CX Landscape: Experience-led Growth**

Speakers: Mark Smith, SVP of Customer Experience, CSG

**FullStory Case Study**

**Qualtrics: Powering Cultural & Organizational Transformation with Omni-Channel CX**

Speakers: Brandon Hanson, Global Contact Center CX GTM + Product Marketing, Qualtrics

**Zoom: AI-Powered Growth: Vensure's Success Story**

Speakers: Andrew Lindley, Global CIO, Vensure Employer Services

Tuesday, Jun 18

3:25 pm – 3:55 pm  
CDT**Breakout Sessions****THE FUTURE OF HUMANS + AI****Put Humans In Charge Of Your AI Minions**Speakers: Michele Goetz, VP, Principal Analyst,  
Forrester**ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE****Capture The Value Of Customer Lifetime Value**Speakers: Brandon Purcell, VP, Principal Analyst, Forrester  
Matthew Blasco, Managing Director and Head of Customer Analytics, JP Morgan Chase  
Barbara Lincoln, Director of Customer Satisfaction & Integration, Erie Insurance**HUMAN-CENTERED, AI-READY LEADERSHIP****Embedding AI? First, Get Your House In Order With Org Effectiveness**Speakers: Betsy Summers, Principal Analyst,  
Forrester**BETTER TOGETHER: CX + DIGITAL + MARKETING****Optimize Your Tech Stack For Customer Outcomes**Speakers: Colleen Fazio, Senior Analyst, Forrester  
Rusty Warner, VP, Principal Analyst, Forrester**AI EVERYWHERE?****Generative AI in Customer Self-Service**

Speakers: Max Ball, Principal Analyst, Forrester

**DELIVER EXPERIENCES AT DIGITAL SPEED****GenAI Experiences In The Real World**Speakers: Ian Jacobs, VP, Research Director, Forrester  
Chris Valleskey, Group Director, Creative Technology, Eversana**THE GENAI TRUST IMPERATIVE****Privacy Now, Not Later: GenAI Consumer Privacy By Design**

Speakers: Stephanie Liu, Senior Analyst, Forrester

3:25 pm – 4:40 pm  
CDT**Skill Building Workshop | The OG of Relationship Marketing: Using Email Marketing To Connect With Your Customers**

Speakers: Shar VanBoskirk, VP, Principal Analyst, Forrester



**Tuesday, Jun 18**

3:55 pm – 4:35 pm CDT	<b>Marketplace Coffee Break &amp; Networking (In-Person Only)</b>  <b>4:00 - 4:10pm - Qualtrics: Leveraging AI in CX for Personalized Customer Journeys</b> Speakers: Manesha Powar, Head of Product Management, Qualtrics  <b>4:15-4:25pm - Genesys: Fireside Chat</b> Speakers: Richard Kasper, VP Automated Communications, Modivcare
4:10 pm – 4:40 pm CDT	<b>Executive Leadership Exchange (Invite-Only): Organizational Effectiveness Workshop</b> Speakers: Betsy Summers, Principal Analyst, Forrester
4:35 pm – 5:05 pm CDT	<b>Keynote: Introducing Your Future AI Consumer</b> Speakers: Audrey Chee-Read, Principal Analyst, Forrester
5:10 pm – 5:40 pm CDT	<b>Keynote: 2024 Customer-Obsessed Enterprise Award Winner</b>
6:30 pm – 8:30 pm CDT	<b>Executive Leadership Exchange (Invite-Only): Exclusive Dinner</b>
5:45 pm – 6:45 pm CDT	<b>Reception</b>

**Wednesday, Jun 19**

8:30 am – 9:30 am CDT	<b>General Breakfast</b>
9:30 am – 9:40 am CDT	<b>Welcome Back</b> Speakers: Rick Parrish, VP, Research Director, Forrester
9:40 am – 10:10 am CDT	<b>Keynote: One Strategy To Rule Them All</b> Speakers: Judy Weader, Principal Analyst, Forrester

**Wednesday, Jun 19**

10:15 am – 10:45 am CDT	<b>Keynote: Forrester's 2024 Customer-Obsessed Leadership Award Winners</b> Speakers: Jen Sanning, Executive Partner, Forrester
10:50 am – 11:35 am CDT	<b>Marketplace Coffee Break &amp; Coffee Chat (In-Person Only)</b>  <b>10:55-11:05am - Nice Spotlight Session</b>  <b>11:10-11:20am - CSG: Targeting Customer Experience "Paper Cuts" for Quick Wins</b> Speakers: Brandon Sailors, Vice President, CX Strategic Accounts, CSG  <b>11:25-11:35am - FullStory: Behavioral Data: Outpace the Competition &amp; Ensure Customer Satisfaction</b> Speakers: Phil Simpson, SVP Global Sales, FullStory
10:50 am – 11:35 am CDT	<b>Executive Leadership Exchange (Invite-Only): Q&amp;A with 2024 Customer-Obsessed Leadership Winners</b> Speakers: Eric Epstein, VP, Executive Partner, Forrester Melissa Gill, VP, CX Executive Partner • Executive Program, Forrester
11:00 am – 12:15 pm CDT	<b>Skill Building Workshop   Learn How To Facilitate Workshops That Get Results</b> Speakers: AJ Joplin, Senior Analyst, Forrester

Wednesday, Jun 19

11:35 am – 12:20 pm  
CDT**Breakout Sessions + Ask An Expert****THE FUTURE OF HUMANS + AI****The Algorithm of You: Meet Your Digital Double**Speakers: Stephanie Liu, Senior Analyst,  
Forrester**ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE****Embrace The Three Pillars Of Personalization And A Measurement Plan**Speakers: Jessica Liu, Principal Analyst,  
Forrester**HUMAN-CENTERED, AI-READY LEADERSHIP****Panel: Unlocking GenAI For CX Transformation**Speakers: Katy Cobian, VP, Executive Partner,  
Forrester Abhii Parakh, Vice President, Head of  
Enterprise Experience, Prudential  
Financial Vishal Bhalla, SVP, Chief Experience  
Officer, Advocate Health**BETTER TOGETHER: CX + DIGITAL + MARKETING****How To Align Metrics To Drive Business Value**Speakers: Pete Jacques, Principal Analyst,  
Forrester**AI EVERYWHERE?****The AI Solutions That Are Transforming Retail**Speakers: Sucharita Kodali, VP, Principal  
Analyst, Forrester Tom Hutchins, Vice  
President - Technology Governance, Strategy  
& Business Operations, Tractor Supply**DELIVER EXPERIENCES AT DIGITAL SPEED****Let's Dissect Real Chatbot Experiences**Speakers: David Truog, VP, Principal Analyst,  
Forrester Max Ball, Principal Analyst, Forrester**THE GENAI TRUST IMPERATIVE****Engage Consumers With AI-Integrated Creativity**Speakers: Nikhil Lai, Senior Analyst,  
Forrester Guy Friedel, Head of Creative  
Building, Amazon Ads

**Wednesday, Jun 19**

12:30 pm – 1:00 pm CDT	<b>Case Study Sessions (In-Person Only)</b>  <b>Bynder™ Case Study</b>  <b>Calendly: How DocuSign Accelerates Customer Value with Automation</b> Speakers: Brad Thomas, Senior Customer Onboarding Program Manager, DocuSign Joel Knight, Head of Customer Success, Calendly  <b>Genesys Case Study</b>  <b>IntouchCX Case Study</b>  <b>Thematic: Fast and Flexible: How Research at DoorDash delivers more with less</b> Speakers: Zach Schendel, Head of Research, DoorDash
1:10 pm – 2:15 pm CDT	<b>Lunch &amp; Marketplace (In-Person Only)</b>
1:10 pm – 2:15 pm CDT	<b>Lunch &amp; Learn Session (In-Person Only)</b>  <b>Lunch &amp; Learn with FullStory</b>  <b>Lunch &amp; Learn with Medallia</b>
1:10 pm – 2:00 pm CDT	<b>Executive Leadership Exchange (Invite-Only): Networking Lunch   Turning Insight Into Leadership</b> Speakers: Angelina Gennis, Senior Analyst, Forrester
1:10 pm – 2:15 pm CDT	<b>Lunch (Invite-Only): Certification Program Wrap-Up</b>

Wednesday, Jun 19

2:25 pm – 3:10 pm  
CDT**Breakout Sessions + Ask An Expert****THE FUTURE OF HUMANS + AI****Generate Real Value With GenAI**

Speakers: Rowan Curran, Senior Analyst,  
Forrester Naj Uddin, Senior Vice President &  
Chief Information Officer, AARP

**ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE****Communicate And Capture Value With Data Storytelling**

Speakers: Kim Herrington, Senior Analyst,  
Forrester

**HUMAN-CENTERED, AI-READY LEADERSHIP****Look Both Ways At The Intersection Of AI And Belonging**

Speakers: Jonathan Roberts, Senior Analyst,  
Forrester Kamilah Sanders, Founder/CEO,  
Greater Than Equal® Missy Dunagan, Director,  
AI Strategy and Solutions, tekcity.ai

**BETTER TOGETHER: CX + DIGITAL + MARKETING****Panel Discussion: To Be Announced!**

Speakers: Melissa Gill, VP, CX Executive  
Partner • Executive Program, Forrester Eric  
Epstein, VP, Executive Partner, Forrester

**AI EVERYWHERE?****Customer Feedback And The Age of AI**

Speakers: Colleen Fazio, Senior Analyst,  
Forrester Sera Tanner, Customer Experience  
Director, Delta Dental of New Jersey and  
Connecticut

**DELIVER EXPERIENCES AT DIGITAL SPEED****When Experiences Meet Regulations**

Speakers: Ian Jacobs, VP, Research Director,  
Forrester Peter Wannemacher, Principal  
Analyst, Forrester Arielle Trzcinski, Principal  
Analyst, Forrester

**THE GENAI TRUST IMPERATIVE****Develop Trust In AI-Powered Martech Capabilities**

Speakers: Joe Stanhope, VP, Principal Analyst,  
Forrester

3:20 pm – 3:50 pm  
CDT**Case Study Sessions (In-Person Only)****Alchemer Case Study****InMoment: Foot Locker Drives Loyalty Through Integrated CX**

Speakers: Tyler Saxey, Sr. Director OMNI Global VOC and Care Solutions, Foot Locker

**Uniphore: Building Your AI Blueprint for Customer Experience**

Speakers: Syvain Tremblay, Chief Revenue Officer, Uniphore

Wednesday, Jun 19

3:50 pm – 4:30 pm CDT	<b>Marketplace Coffee Break &amp; Coffee Chat (In-Person Only)</b>  <b>3:55-4:05pm - Medallia Spotlight Session</b>  <b>4:15-4:25pm - Zoom CX: AI-Powered Agent Efficiency Demo</b> Speakers: Michelle Couture, Global Lead for Customer Experience Product Marketing, Zoom
4:35 pm – 5:05 pm CDT	<b>Keynote: Align To Win: CX, Digital, And Marketing</b> Speakers: Dipanjan Chatterjee, Vice President, Principal Analyst, Forrester
5:10 pm – 5:40 pm CDT	<b>Guest Speaker</b>
5:45 pm – 6:45 pm CDT	<b>Reception</b>

Thursday, Jun 20

8:30 am – 9:30 am CDT	<b>General Breakfast</b>
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Thursday, Jun 20

9:30 am – 10:00 am  
CDT**Breakout Sessions****THE FUTURE OF HUMANS + AI****Humans + AI Will Make You More Customer-Focused**

Speakers: Shar VanBoskirk, VP, Principal Analyst, Forrester

**ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE****Making Sense of Data Madness: Industry Best Practices From The Data-Rich And Data Challenged**

Speakers: Sucharita Kodali, VP, Principal Analyst, Forrester Peter Wannemacher, Principal Analyst, Forrester Arielle Trzcinski, Principal Analyst, Forrester

**HUMAN-CENTERED, AI-READY LEADERSHIP****Cracking The Code Of Employee-Led AI Adoption**

Speakers: David Johnson, Principal Analyst, Forrester

**BETTER TOGETHER: CX + DIGITAL + MARKETING****Craft Your Culture For Collaboration**

Speakers: Jonathan Roberts, Senior Analyst, Forrester Betsy Summers, Principal Analyst, Forrester

**AI EVERYWHERE?****Leveraging AI to Drive Customer Loyalty**

Speakers: Mary Pilecki, VP, Principal Analyst, Forrester Phil Rubin, Founder &amp; Principal, Grey Space Matters

**DELIVER EXPERIENCES AT DIGITAL SPEED****The Humans Behind AI Experiences**

Speakers: Christina McAllister, Senior Analyst, Forrester

**THE GENAI TRUST IMPERATIVE****Authenticity Reframed: How GenAI Challenges What's "Real"**

Speakers: Mo Allibhai, Senior Analyst, Forrester

10:10 am – 10:40 am  
CDT**Case Study Sessions (In-Person Only)**10:40 am – 11:15 am  
CDT**Marketplace Coffee Break & Coffee Chat (In-Person Only)**

Thursday, Jun 20

11:25 am – 11:55 am  
CDT

Breakout Sessions		
<div>THE FUTURE OF HUMANS + AI</div> <div>The AI Arms Race In Recruiting</div> <div>Speakers: Betsy Summers, Principal Analyst, Forrester</div>	<div>ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE</div> <div>Fake It Till You Make It With Synthetic Data</div> <div>Speakers: Zeid Khater, Analyst, Forrester</div>	<div>HUMAN-CENTERED, AI-READY LEADERSHIP</div> <div>How To Build An AI Culture</div> <div>Speakers: Angelina Gennis, Senior Analyst, Forrester</div>
<div>BETTER TOGETHER: CX + DIGITAL + MARKETING</div> <div>Panel: The Alignment Advantage – CX + Digital + Marketing</div> <div>Speakers: Katerina Gryparis, VP, Executive Partner, Forrester Reed Smith, Ardent Health, Chief Consumer Officer</div>	<div>AI EVERYWHERE?</div> <div>Leveraging Predictive AI To Transform Customer Experiences</div> <div>Speakers: Rich Saunders, Senior Analyst, Forrester</div>	<div>DELIVER EXPERIENCES AT DIGITAL SPEED</div> <div>Design With AI Responsibly</div> <div>Speakers: Gina Bhawalkar, Principal Analyst, Forrester</div>
<div>THE GENAI TRUST IMPERATIVE</div> <div>Hit Or Miss? GenAI Brand Activation Showcase</div> <div>Speakers: Emily Collins, VP, Research Director, Forrester Mike Proulx, VP, Research Director, Forrester</div>		

12:10 pm – 12:40 pm  
CDT

**Keynote: Build-Borrow-Buy-Bot Your Way To A Successful Talent Strategy**  
Speakers: Katy Tynan, VP, Principal Analyst, Forrester

12:40 pm – 12:45 pm  
CDT

**Closing Remarks**  
Speakers: Rick Parrish, VP, Research Director, Forrester