



FORRESTER®

# CX Summit North America

## Nashville & Digital

June 17, 2024 – June 20, 2024

In-person Agenda

Agenda downloaded: 2024/04/19 18:06:45

**Bold Starts: Monday, Jun 17**

2:00 pm – 5:00 pm CDT	<p><b>Forrester Women's Leadership Program</b> Speakers: Katy Tynan, VP, Principal Analyst, Forrester Jen Sanning, Executive Partner, Forrester Melissa Gill, VP, CX Executive Partner • Executive Program, Forrester Angelina Gennis, Senior Analyst, Forrester Kim Herrington, Senior Analyst, Forrester Cory Munchbach, Chief Executive Officer, BlueConic</p> <p><b>3:15 pm - 4:00 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 &amp; Inclusion, Forrester Christie Sandoval, Senior Vice President, Customer Experience, T-Mobile</p>
2:30 pm – 5:00 pm CDT	<p><b>First Look: The US Health Insurers Customer Experience Index, 2024</b> Speakers: Judy Weader, Principal Analyst, Forrester Arielle Trzcinski, Principal Analyst, Forrester</p>
2:30 pm – 5:00 pm CDT	<p><b>Workshop: Make Sure Your CX Capabilities Are Mission-Ready</b> Speakers: Su Doyle, Senior Analyst, Forrester Kara Hoisington, Principal Consultant, Forrester</p>
3:00 pm – 5:00 pm CDT	<p><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</p>
5:15 pm – 6:00 pm CDT	<p><b>Musical Experience: Team Anthem</b></p>
6:00 pm – 7:00 pm CDT	<p><b>Welcome Reception</b></p>
6:30 pm – 7:30 pm CDT	<p><b>Executive Leadership Exchange (Invite-Only): Networking Reception: Meet Your Peers</b></p>

**Tuesday, Jun 18**

8:00 am – 9:00 am CDT	<p><b>General Breakfast</b></p>
9:00 am – 9:30 am CDT	<p><b>Opening Remarks</b> Speakers: Rick Parrish, VP, Research Director, Forrester</p>

**Tuesday, Jun 18**

9:35 am – 10:05 am CDT	<b>Keynote: Forge Boundless Experiences With Humans + AI</b> Speakers: J.P. Gownder, VP, Principal Analyst, Forrester
10:10 am – 10:40 am CDT	<b>Guest Speaker</b>
10:45 am – 11:30 am CDT	<b>Marketplace Coffee Break &amp; Networking (In-Person Only)</b>  <b>10:50-11:00am - BlastX Spotlight Session</b>  <b>11:05-11:15am - Forethought Spotlight Session</b>  <b>11:20-11:30am - SurveyMonkey Spotlight Session</b>
10:45 am – 12:00 pm CDT	<b>Skill Building Workshop   Storytelling Essentials: Discovering your Roles, Goals, and Values.</b> Speakers: Kim Herrington, Senior Analyst, Forrester

Tuesday, Jun 18

11:30 am – 12:00 pm  
CDT

Breakout Sessions		
<b>THE FUTURE OF HUMANS + AI</b>	<b>ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE</b>	<b>HUMAN-CENTERED, AI-READY LEADERSHIP</b>
<p><b>Five Steps For Building Differentiation With GenAI</b> Speakers: Rowan Curran, Senior Analyst, Forrester</p>	<p><b>Panel: Analytically-Driven CX Improvement</b> 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</p>	<p><b>Are You A Better Boss Than A Bot? Level Up Your Leadership Skills For An AI-Infused World</b> Speakers: Katy Tynan, VP, Principal Analyst, Forrester</p>
<b>BETTER TOGETHER: CX + DIGITAL + MARKETING</b>	<b>AI EVERYWHERE?</b>	<b>DELIVER EXPERIENCES AT DIGITAL SPEED</b>
<p><b>Align And Activate For Amazing Experiences</b> Speakers: Su Doyle, Senior Analyst, Forrester AJ Joplin, Senior Analyst, Forrester</p>	<p><b>Impact Customer Outcomes with AI Powered Digital Experiences</b> Speakers: Chuck Gahun, Principal Analyst, Forrester</p>	<p><b>No Experience Is The Most Convenient Experience</b> Speakers: Joe Stanhope, VP, Principal Analyst, Forrester Jessica Liu, Principal Analyst, Forrester</p>
<b>THE GENAI TRUST IMPERATIVE</b>		
<p><b>Don't Get Canceled: Overcoming GenAI Consumer Backlash</b> Speakers: Audrey Chee-Read, Principal Analyst, Forrester</p>		

**Tuesday, Jun 18**

12:10 pm – 12:40 pm  
CDT

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

**Acxiom Case Study**

**Concentrix Case Study**

**FullStory Case Study**

**Nice Case Study**

**Observe.ai Case Study**

12:50 pm – 1:55 pm  
CDT

**Lunch & Marketplace (In-Person Only)**

12:50 pm – 1:55 pm  
CDT

**12:50-1:55pm CDT | Lunch & Learn Session (In-Person Only)**

**Lunch & Learn with Medallia**

12:50 pm – 1:45 pm  
CDT

**Executive Leadership Exchange (Invite-Only): Exclusive Lunch with Analyst-Led Topic Tables**

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

2:45 pm – 3:15 pm  
CDT

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

- Callminer Case Study**
- CSG Case Study**
- FullStory Case Study**
- Qualtrics Case Study**
- Zoom Case Study**

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?**

**Conversational 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 Spotlight Session</b>  <b>4:15-4:25pm - Genesys Spotlight Session</b>
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
10:15 am – 10:45 am CDT	<b>Guest Speaker</b>



**Wednesday, Jun 19**

10:50 am – 11:35 am  
CDT

**Marketplace Coffee Break & Coffee Chat (In-Person Only)**

**10:55-11:05am - Nice Spotlight Session**

**11:10-11:20am - CSG Spotlight Session**

**11:25-11:35am - FullStory Spotlight Session**

10:50 am – 11:35 am  
CDT

**Executive Leadership Exchange (Invite-Only): Q&A with 2024 Customer-Obsessed Leadership Winners**

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

11:00 am – 12:15 pm  
CDT

**Skill Building Workshop | Learn How To Facilitate Workshops That Get Results**

Speakers: AJ Joplin, Senior Analyst, Forrester

Wednesday, Jun 19

11:35 am – 12:20 pm  
CDT

<b>Breakout Sessions + Ask An Expert</b>		
<b>THE FUTURE OF HUMANS + AI</b>	<b>ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE</b>	<b>HUMAN-CENTERED, AI-READY LEADERSHIP</b>
<b>The Algorithm of You: Meet Your Digital Self</b> Speakers: Stephanie Liu, Senior Analyst, Forrester	<b>Embrace The Three Pillars Of Personalization And A Measurement Plan</b> Speakers: Jessica Liu, Principal Analyst, Forrester	<b>Cracking The Code Of Employee-Led AI Adoption</b> Speakers: David Johnson, Principal Analyst, Forrester
<b>BETTER TOGETHER: CX + DIGITAL + MARKETING</b>	<b>AI EVERYWHERE?</b>	<b>DELIVER EXPERIENCES AT DIGITAL SPEED</b>
<b>How To Align Metrics To Drive Business Value</b> Speakers: Pete Jacques, Principal Analyst, Forrester	<b>The AI Solutions That Are Transforming Retail</b> Speakers: Sucharita Kodali, VP, Principal Analyst, Forrester Tom Hutchins, Vice President - Technology Governance, Strategy & Business Operations, Tractor Supply	<b>Let's Dissect Real Chatbot Experiences</b> Speakers: David Truog, VP, Principal Analyst, Forrester Max Ball, Principal Analyst, Forrester
<b>THE GENAI TRUST IMPERATIVE</b>		
<b>Earn Consumers' Trust With AI-Integrated Advertising</b> Speakers: Nikhil Lai, Senior Analyst, Forrester		

12:30 pm – 1:00 pm  
CDT

<b>Case Study Sessions (In-Person Only)</b>		
<b>Bynder™ Case Study</b>		
<b>Calendly Case Study</b>		
<b>Genesys Case Study</b>		
<b>IntouchCX Case Study</b>		
<b>Thematic Case Study</b>		

**Wednesday, Jun 19**

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**

<p><b>THE FUTURE OF HUMANS + AI</b></p> <p><b>Generate Real Value With GenAI</b> Speakers: Rowan Curran, Senior Analyst, Forrester Naj Uddin, Senior Vice President &amp; Chief Information Officer, AARP</p>	<p><b>ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE</b></p> <p><b>Communicate And Capture Value With Data Storytelling</b> Speakers: Kim Herrington, Senior Analyst, Forrester</p>	<p><b>HUMAN-CENTERED, AI-READY LEADERSHIP</b></p> <p><b>Look Both Ways At The Intersection Of AI And Belonging</b> Speakers: Jonathan Roberts, Senior Analyst, Forrester Fadjanie Cadet, Director, Diversity &amp; Inclusion, Forrester Kamilah Sanders, Founder/CEO, Greater Than Equal® Missy Dunagan, Director, AI Strategy and Solutions, tekcity.ai</p>
<p><b>BETTER TOGETHER: CX + DIGITAL + MARKETING</b></p> <p><b>Forrester’s 2024 Customer-Obsessed Leadership Award Winners</b> Speakers: Melissa Gill, VP, CX Executive Partner • Executive Program, Forrester Eric Epstein, VP, Executive Partner, Forrester</p>	<p><b>AI EVERYWHERE?</b></p> <p><b>Customer Feedback And The Age of AI</b> Speakers: Colleen Fazio, Senior Analyst, Forrester Sera Tanner, Customer Experience Director, Delta Dental of New Jersey and Connecticut</p>	<p><b>DELIVER EXPERIENCES AT DIGITAL SPEED</b></p> <p><b>When Experiences Meet Regulations</b> Speakers: Ian Jacobs, VP, Research Director, Forrester Peter Wannemacher, Principal Analyst, Forrester Arielle Trzcinski, Principal Analyst, Forrester</p>
<p><b>THE GENAI TRUST IMPERATIVE</b></p> <p><b>Develop Trust In AI-Powered Martech Capabilities</b> Speakers: Joe Stanhope, VP, Principal Analyst, Forrester</p>		

3:20 pm – 3:50 pm  
CDT

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

- Alchemer Case Study**
- InMoment Case Study**
- Uniphore Case Study**

**Wednesday, Jun 19**

3:50 pm – 4:30 pm  
CDT

**Marketplace Coffee Break & Coffee Chat (In-Person Only)**

**3:55-4:05pm - Medallia Spotlight Session**

**4:15-4:25pm - Zoom Spotlight Session**

4:35 pm – 5:05 pm  
CDT

**Keynote: Align To Win: CX, Digital, And Marketing**

Speakers: Dipanjan Chatterjee, Vice President, Principal Analyst, Forrester

5:10 pm – 5:40 pm  
CDT

**Guest Speaker**

5:45 pm – 6:45 pm  
CDT

**Reception****Thursday, Jun 20**

8:30 am – 9:30 am  
CDT

**General Breakfast**

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**

**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**

**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 & 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**

**THE FUTURE OF HUMANS + AI**

**The AI Arms Race In Recruiting**

Speakers: Betsy Summers, Principal Analyst, Forrester

**BETTER TOGETHER: CX + DIGITAL + MARKETING**

**Panel: The Alignment Advantage – CX + Digital + Marketing**

Speakers: Katerina Gryparis, VP, Executive Partner, Forrester Reed Smith, Ardent Health, Chief Consumer Officer

**THE GENAI TRUST IMPERATIVE**

**Hit Or Miss? GenAI Brand Activation Showcase**

Speakers: Emily Collins, VP, Research Director, Forrester Mike Proulx, VP, Research Director, Forrester

**ANALYTICAL ALCHEMY: TRANSFORM DATA INTO VALUE**

**Fake It Till You Make It With Synthetic Data**

Speakers: Zeid Khater, Analyst, Forrester

**AI EVERYWHERE?**

**Leveraging Predictive AI To Transform Customer Experiences**

Speakers: Rich Saunders, Senior Analyst, Forrester

**HUMAN-CENTERED, AI-READY LEADERSHIP**

**How To Build An AI Culture**

Speakers: Angelina Gennis, Senior Analyst, Forrester

**DELIVER EXPERIENCES AT DIGITAL SPEED**

**Design Responsibly With AI**

Speakers: Gina Bhawalkar, Principal Analyst, Forrester

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