



FORRESTER®

CX Summit North America

Nashville & Digital

June 23, 2025 – June 26, 2025

Agenda downloaded: 2025/05/02 06:08:20

Bold Starts: Monday, Jun 23

1:30 pm – 4:00 pm
CDT

Forrester Women's Leadership Program: Bold At Work

Speakers: Fiona Swerdlow, VP, Research Director, Forrester Judy Weader, Principal Analyst, Forrester

1:30 PM | Arrival, Coffee, Networking

2:00 PM | Panel: How I've Led And Navigated Bold At Work Amid Constant Change

2:40 PM | Table Discussions: How I'm Bold At Work Amid Constant Change

3:00 PM | Break

3:10 PM | Peer Discussions focused on: navigating tough conversations, everything AI, burnout, etc.

4:00 PM | Women's Leadership Program Concludes

2:30 pm – 4:00 pm
CDT

Workshop: Scope Your AI Agent Future

Speakers: Stephanie Liu, Senior Analyst, Forrester Rowan Curran, Principal Analyst, Forrester

2:30 pm – 4:00 pm
CDT

Workshop: Make Sure Your CX Capabilities Are Mission-Ready

Speakers: Su Doyle, Principal Analyst, Forrester Julie Young, Manager, Senior Consultant, Forrester

4:00 pm – 6:00 pm
CDT

Executive Leadership Exchange (Invite-Only): Lead and Master Change In Times Of Volatility

Speakers: Katy Tynan, VP, Principal Analyst, Forrester Jen Sanning, Executive Partner, Forrester Ron Rogowski, VP, Executive Partner, Forrester

4:30 pm – 6:00 pm
CDT

CX Certification Program: Journey Mapping Fundamentals

Speakers: Senem Guler Biyikli, Analyst, Forrester Jenna Wohead, Director, Product Management, Forrester

Bold Starts: Monday, Jun 23

4:30 pm – 6:00 pm CDT	Workshop: The OG Of Relationship Marketing: Using Email Marketing To Connect With Your Customers Speakers: Shar VanBoskirk, VP, Principal Analyst, Forrester
6:00 pm – 7:30 pm CDT	Welcome Reception
6:15 pm – 7:30 pm CDT	Executive Leadership Exchange (Invite-Only): Welcome Reception

Tuesday, Jun 24

8:00 am – 9:00 am CDT	General Breakfast
8:00 am – 8:45 am CDT	Government Leadership Breakfast Speakers: Katy Tynan, VP, Principal Analyst, Forrester
9:00 am – 9:20 am CDT	Opening Remarks Speakers: George Colony, CEO, Forrester
9:25 am – 9:55 am CDT	Keynote: Win And Retain The Distracted Consumer Speakers: Kelsey Chickering, Principal Analyst, Forrester
10:05 am – 10:35 am CDT	Keynote: Power Growth With Your Total Experience Speakers: Dipanjan Chatterjee, Vice President, Principal Analyst, Forrester Pete Jacques, Principal Analyst, Forrester

Tuesday, Jun 24

10:45 am – 11:30 am CDT	Marketplace Coffee Break & Networking (In-Person Only) 10:50-11:00am - Observe.AI: You Built AI to Deflect. Customers Want Connection. Let's fix that. Speakers: John McMullan, Director, VoiceAI Product Marketing, Observe.AI 11:05-11:15am - CallMiner: Future of CX: Transforming Customer Feedback with AI Speakers: Ed Matanes, Product Marketing Associate, CallMiner 11:20-11:30am - Thematic Spotlight Session
10:50 am – 12:05 pm CDT	Workshop: Build Your CX ROI Story Speakers: Judy Weader, Principal Analyst, Forrester Julie Young, Manager, Senior Consultant, Forrester
10:50 am – 12:05 pm CDT	Workshop: Better Together: Customer Segmentation And Data Strategy Speakers: Stephanie Liu, Senior Analyst, Forrester Zeid Khater, Analyst, Forrester
11:00 am – 11:30 am CDT	Analyst-Led Roundtables (Pre-Registration Required) Sticky Data Storytelling Solutions Speakers: Kim Herrington, Senior Analyst, Forrester Keynote Q&A: Adopt An Experience Mindset To Win And Retain The Distracted Consumer Speakers: Kelsey Chickering, Principal Analyst, Forrester

Tuesday, Jun 24

11:30 am – 12:00 pm
CDT**Breakout Sessions****MEASURE YOUR WAY TO JOURNEY MASTERY****Must-Have Data And Metrics For Marketing Measurement**

Speakers: Brad Haag, Senior Analyst, Forrester

WOW CUSTOMERS WITH SEAMLESS STRATEGY AND OPERATIONS**The Strategy And Practice Of Journey Centricity**

Speakers: Senem Guler Biyikli, Analyst, Forrester Todd Keith, Head of Experience Design (XD), Regions Bank Nancy Flowers, Vice President of Customer Experience, Voya Financial

LEVERAGE TECH FOR STELLAR CX — AND EX**Optimize Tech Investments To Fuel CX Transformation**

Speakers: Colleen Fazio, Senior Analyst, Forrester

POWER CX WITH LEADERSHIP AND CULTURE**Develop Your Leadership Promise To Its CX Fulfillment**

Speakers: James L. McQuivey, PhD, VP, Research Director, Forrester Josh Heitsenrether, Senior Managing Director, Marketing & Digital Strategy, American Society of Mechanical Engineers (ASME)

DEVELOP INDUSTRY-SPECIFIC CX STRATEGIES**The Trust Thread: Powering Financial Services Loyalty And Primacy**

Speakers: Alyson Clarke, Principal Analyst, Forrester

DESIGN FOR CONSUMERS' TOTAL EXPERIENCE**Create A Total Consumer View For Your Brand**

Speakers: Audrey Chee-Read, Principal Analyst, Forrester

12:10 pm – 12:40 pm
CDT**Case Study Sessions****Alchemer: Unforgettable Experiences: AEG's Fan-To-Brand Magic**

Speakers: Matt Lawler, Vice President of Data and Insights, AEG Global Partnerships Ryan Tamminga, Senior Vice President of Product and Services, Alchemer

CSG: The Prove It Era Of Customer Engagement

Speakers: Megan Lukitsch, VP of Customer Experience, CSG

Medallia: Insights To Action: Client-Centric Decisioning For Business Success

Speakers: Stephanie Leheta, Senior Director - CX Strategy, Governance & Design Thinking, CIBC

NICE Case Study12:50 pm – 1:55 pm
CDT**Lunch & Marketplace (In-Person Only)**12:50 pm – 1:40 pm
CDT**Bold At Work: Women's Leadership Networking Lunch**

Speakers: Fiona Swerdlow, VP, Research Director, Forrester

Tuesday, Jun 24

12:50 pm – 1:45 pm
CDT

Executive Leadership Exchange (Invite-Only): Exclusive Networking Lunch

2:05 pm – 2:35 pm
CDT

Breakout Sessions

MEASURE YOUR WAY TO JOURNEY MASTERY

A Deeper Dive Into Forrester's New Brand Experience (BX) Index

Speakers: Dipanjan Chatterjee, Vice President, Principal Analyst, Forrester Shalika Fernando, Senior Analyst, Forrester

LEVERAGE TECH FOR STELLAR CX — AND EX

Your Billing And Payment Tech Is Crucial To CX

Speakers: Lily Varon, Principal Analyst, Forrester

DEVELOP INDUSTRY-SPECIFIC CX STRATEGIES

Intelligent Healthcare Organizations Breathe Life Into CX

Speakers: Shannon Germain Farraher, Senior Analyst, Forrester

INDUSTRY MEETUP: GOVERNMENT

Government Meetup

Speakers: Colleen Fazio, Senior Analyst, Forrester Judy Weader, Principal Analyst, Forrester

WOW CUSTOMERS WITH SEAMLESS STRATEGY AND OPERATIONS

How To Align AI Operations With Strategy In The Contact Center And Beyond

Speakers: Max Ball, Principal Analyst, Forrester

POWER CX WITH LEADERSHIP AND CULTURE

Build Your EX-To-CX Strategy Now

Speakers: Angelina Gennis, Principal Analyst, Forrester

DESIGN FOR CONSUMERS' TOTAL EXPERIENCE

Prepare Your Full-Funnel Creative Strategy

Speakers: Jay Pattisall, VP, Principal Analyst, Forrester

INDUSTRY MEETUP: FINANCIAL SERVICES

Financial Services Meetup

Speakers: Peter Wannemacher, Principal Analyst, Forrester Alyson Clarke, Principal Analyst, Forrester

2:45 pm – 3:15 pm
CDT

Case Study Sessions

Genesys Case Study

Qualtrics Case Study

TheyDo: Mapping Value Faster with Connected Journeys

Speakers: Roxanne Knapp, AVP Experience Design Strategy, MetLife

Dialpad Case Study

Tuesday, Jun 24

3:25 pm – 3:55 pm
CDT**Breakout Sessions****MEASURE YOUR WAY TO JOURNEY MASTERY****How AutoZone Implements Full-Funnel Advertising**

Speakers: Nikhil Lai, Principal Analyst, Forrester Robyn Simburger, Marketing Director, Merchandise Marketing and Media, AutoZone, Inc.

LEVERAGE TECH FOR STELLAR CX — AND EX**AI Agents: Hype Vs. Reality And What It Means**

Speakers: Stephanie Liu, Senior Analyst, Forrester

DEVELOP INDUSTRY-SPECIFIC CX STRATEGIES**Killer Phygital: How To Blend Physical And Digital Experiences In Retail And Beyond**

Speakers: Sucharita Kodali, VP, Principal Analyst, Forrester Brendan Witcher, VP, Principal Analyst, Forrester James Russo, Strategy & Insight Lead T-Mobile Advertising Solutions , T-Mobile

WOW CUSTOMERS WITH SEAMLESS STRATEGY AND OPERATIONS**It's Time For B2C Marketing Operations To Shine**

Speakers: Jessica Liu, Principal Analyst, Forrester

POWER CX WITH LEADERSHIP AND CULTURE**Lead Your People To Maximum Tech Readiness With AIQ**

Speakers: James L. McQuivey, PhD, VP, Research Director, Forrester

DESIGN FOR CONSUMERS' TOTAL EXPERIENCE**Supercharge Dynamic Commerce With The Future of Digital Experiences**

Speakers: Chuck Gahun, Principal Analyst, Forrester

3:25 pm – 4:40 pm
CDT**Workshop: Level Up Your B2B CX Measurement**

Speakers: Rich Saunders, Senior Analyst, Forrester Su Doyle, Principal Analyst, Forrester

3:25 pm – 4:40 pm
CDT**Workshop: Build Effective Personas To Drive Empathy**

Speakers: Audrey Chee-Read, Principal Analyst, Forrester Gina Bhawalkar, Principal Analyst, Forrester

3:55 pm – 4:40 pm
CDT**Marketplace Coffee Break & Networking (In-Person Only)****4:00-4:10pm - NICE Spotlight Session****4:15-4:25pm - Qualtrics: Beginning Your Omnichannel Listening Quest**

Speakers: Menon Billingsley, Head of Solution Strategy for Technology, Media, and Telecom, Qualtrics

4:30-4:40pm - Zoho Spotlight Session

Tuesday, Jun 24

4:05 pm – 4:35 pm CDT	Analyst-Led Roundtables (Pre-Registration Required) How Do You Do Self-Service Right? Speakers: Max Ball, Principal Analyst, Forrester Sharing Leadership Best Practices And Honest Pitfalls Speakers: James L. McQuivey, PhD, VP, Research Director, Forrester
4:05 pm – 4:35 pm CDT	CX Summit Certification Roundtables (Pre-Registration Required) Ground Your Journeys In Measurement Speakers: Pete Jacques, Principal Analyst, Forrester Make Your Journeys Accessible Speakers: Julie Young, Manager, Senior Consultant, Forrester Design Future-State Journeys Journey Mapping Tips And Tricks Speakers: Senem Guler Biyikli, Analyst, Forrester Design Employee Journeys Inform Journeys With Customer Insights Speakers: Zeid Khater, Analyst, Forrester
4:40 pm – 5:10 pm CDT	Keynote: 2025 Customer-Obsessed Enterprise Award Speakers: Sharyn Leaver, Chief Research Officer, Forrester
5:15 pm – 5:45 pm CDT	Keynote: Design For The Future Of Experiences Speakers: AJ Joplin, Senior Analyst, Forrester
5:45 pm – 5:45 pm CDT	Closing Remarks Speakers: Rick Parrish, VP, Research Director, Forrester

Tuesday, Jun 24

5:45 pm – 6:45 pm CDT	Reception
6:30 pm – 8:30 pm CDT	Executive Leadership Exchange (Invite-Only): Exclusive Dinner

Wednesday, Jun 25

8:30 am – 9:30 am CDT	General Breakfast
8:30 am – 9:15 am CDT	Breakfast Boardroom Medallia Breakfast Boardroom
9:30 am – 9:40 am CDT	Welcome Back Speakers: Rick Parrish, VP, Research Director, Forrester
9:40 am – 10:10 am CDT	Keynote: No More Excuses: Practice Customer Obsession The Right Way Speakers: Shar VanBoskirk, VP, Principal Analyst, Forrester
10:15 am – 10:45 am CDT	Keynote: 2025 Customer-Obsessed Leadership Award Speakers: Keith Johnston, VP, Group Director, Forrester
10:50 am – 11:35 am CDT	Marketplace Coffee Break & Networking (In-Person Only) 10:55-11:05am - CSG: Journey Analytics: Find What's Broken And Fix It Speakers: Keith Wilson, Executive Director of Product, CSG 11:10-11:20am - Grammarly: How Grammarly AI Supercharges Your Existing CX Stack Speakers: Grant Horn, Enterprise Account Executive, Grammarly 11:25-11:35am - Genesys Spotlight Session

Wednesday, Jun 25

10:55 am – 11:30 am CDT	Get The Most From Forrester (Pre-Registration Required) Speakers: Andrew McCauley, VP, Product Management, Forrester Jenna Wohead, Director, Product Management, Forrester	
11:00 am – 11:30 am CDT	Analyst-Led Roundtables (Pre-Registration Required) Keynote Q&A: Design For The Future Of Experiences Speakers: AJ Joplin, Senior Analyst, Forrester Combining Brand + CX Is Hard But Possible Speakers: Mike Proulx, VP, Research Director, Forrester	
11:00 am – 12:15 pm CDT	Workshop: CX Quality, Trust, And The Role Of Technology For Health Insurers Speakers: Arielle Trzcinski, Principal Analyst, Forrester Shannon Germain Farraher, Senior Analyst, Forrester Judy Weader, Principal Analyst, Forrester	
11:00 am – 12:15 pm CDT	Workshop: Condition Your Culture For Collaboration Speakers: Betsy Summers, Principal Analyst, Forrester	
11:35 am – 12:20 pm CDT	Breakout Sessions	
	MEASURE YOUR WAY TO JOURNEY MASTERY	WOW CUSTOMERS WITH SEAMLESS STRATEGY AND OPERATIONS
	How The AI Revolution Impacts Customer Analytics Speakers: Rowan Curran, Principal Analyst, Forrester	The Future Of Commerce Speakers: Chuck Gahun, Principal Analyst, Forrester
	LEVERAGE TECH FOR STELLAR CX — AND EX	POWER CX WITH LEADERSHIP AND CULTURE
	The Best Tech Bets In Customer Service Speakers: Max Ball, Principal Analyst, Forrester Luis Angel-Lalanne, Vice President, Complaints Transformation, American Express	How To Lead Change For Improved Customer Outcomes Speakers: Katy Tynan, VP, Principal Analyst, Forrester
	DEVELOP INDUSTRY-SPECIFIC CX STRATEGIES	DESIGN FOR CONSUMERS' TOTAL EXPERIENCE
	Making CX Practical For Technology Firms Speakers: Su Doyle, Principal Analyst, Forrester	Design Personalized Moments That Consumers Find Relevant And Valuable Speakers: Jessica Liu, Principal Analyst, Forrester Jeanne Jones, Vice President of Digital Marketing, BECU Holly Moreland, Sr Director, Customer Engagement Strategy and Technology, Hilton Julia Binder, Senior Director of Customer Experience Strategy & Analytics, Toast Chris Conner, Senior Director of Digital Management and Strategy of Consumer Energy, NRG Energy

Wednesday, Jun 25

12:30 pm – 1:00 pm CDT	<p>Case Study Sessions</p> <p>Concentrix Case Study</p> <p>Cresta Case Study</p> <p>Inbenta: FamilySearch's multilingual 95%+ accurate, scalable AI Agent Speakers: Merlin Bise, Chief Technology Officer, Inbenta AI</p> <p>Treasure Data Case Study</p>
1:10 pm – 1:55 pm CDT	<p>Lunch & Marketplace (In-Person Only)</p>
1:10 pm – 2:00 pm CDT	<p>Executive Leadership Exchange (Invite-Only): Lunch featuring Q&A with Award Winners</p>

Wednesday, Jun 25

2:25 pm – 3:10 pm
CDT

Breakout Sessions

MEASURE YOUR WAY TO JOURNEY MASTERY

Elevate Your Approach To Measuring Digital User Experiences

Speakers: Gina Bhawalkar, Principal Analyst, Forrester

LEVERAGE TECH FOR STELLAR CX — AND EX

The Blueprint For Customer Data Platform Success

Speakers: Joe Stanhope, VP, Principal Analyst, Forrester

DEVELOP INDUSTRY-SPECIFIC CX STRATEGIES

Create Differentiating Digital Brand Experiences In Financial Services

Speakers: Peter Wannemacher, Principal Analyst, Forrester Rohit Makhijani, Principal Analyst, Forrester

INDUSTRY MEETUP: HEALTHCARE

Healthcare Meetup

Speakers: Arielle Trzcinski, Principal Analyst, Forrester Shannon Germain Farraher, Senior Analyst, Forrester

WOW CUSTOMERS WITH SEAMLESS STRATEGY AND OPERATIONS

CX Superpowers: Link Experience Quality To Business Performance

Speakers: Rich Saunders, Senior Analyst, Forrester

POWER CX WITH LEADERSHIP AND CULTURE

Case Study: Upskill Your People For Measurable CX Impact

Speakers: Betsy Summers, Principal Analyst, Forrester Rebecca Biestman, CMO, Guild Dr. KimArie Yowell, Chief Talent and DEI Officer, Rocket

DESIGN FOR CONSUMERS' TOTAL EXPERIENCE

Panel: Maximize The Value Of Your Sports Sponsorships

Speakers: Mike Proulx, VP, Research Director, Forrester Sara Bonds, SVP of Strategic Partnerships, APP (Association of Pickleball Players) Gregg Molander, Senior Director of Brand Experience, AARP

3:20 pm – 3:50 pm
CDT

Case Study Sessions

Dovetail: How Leading User Experience Teams Build Customer Centricity At Scale

Speakers: Cheryl Abellanoza, PhD, Associate Director - UX Research, Verizon Connect

OP360: From Call Center to Revenue Generator: How Voice Optimization Doubled Ideal Image's Sales

Speakers: Tom Moskal, VP of Global Client Services, OP360 Sheron Smith, Sr. Director, Contact Centers, Ideal Image

SundaySky Case Study

3:25 pm – 4:40 pm
CDT

Workshop: Persuade Executives with Data-Rich Stories

Speakers: Colleen Fazio, Senior Analyst, Forrester Kelsey Chickering, Principal Analyst, Forrester

Wednesday, Jun 25

3:50 pm – 4:35 pm
CDT

Marketplace Coffee Break & Networking (In-Person Only)**4:10-4:20pm - Trustpilot: Fueling Business Growth. The ROI Of Authentic Customer Feedback**

Speakers: Vincent Petrillo, General Manager and Vice President of US Commercial, Trustpilot

4:25-4:35pm - Qualtrics: Transforming Omnichannel Insights Into Meaningful Action

Speakers: Mitch Milner, Senior Principal Solutions Engineer, Qualtrics

4:00 pm – 4:30 pm
CDT

Analyst-Led Roundtables (Pre-Registration Required)**Keynote Q&A: Brand + CX Powers Growth**

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

Creating Strategy From The Outside In

Speakers: Shar VanBoskirk, VP, Principal Analyst, Forrester

4:45 pm – 5:15 pm
CDT

Keynote: The Network Effects Of AI Create Powerful Experiences

Speakers: Jay Pattisall, VP, Principal Analyst, Forrester

5:15 pm – 5:15 pm
CDT

Closing Remarks

Speakers: Rick Parrish, VP, Research Director, Forrester

5:15 pm – 6:05 pm
CDT

Reception

6:05 pm – 7:20 pm
CDT

Live Music Performance**Thursday, Jun 26**

8:30 am – 9:30 am
CDT

General Breakfast

Thursday, Jun 26

9:30 am – 10:45 am
CDT**Forrester Workshops****MEASURE YOUR WAY TO JOURNEY MASTERY****Boost Your Experience Measurement Mastery**

Speakers: Rich Saunders, Senior Analyst, Forrester Pete Jacques, Principal Analyst, Forrester

WOW CUSTOMERS WITH SEAMLESS STRATEGY AND OPERATIONS**Where Should Your CX Function Sit?**

Speakers: Judy Weader, Principal Analyst, Forrester Lana Pruett, Director of Customer and Digital Experience, Blue Cross and Blue Shield of Kansas Amy Cheng, Senior Director Experience Insights, Shipt

LEVERAGE TECH FOR STELLAR CX — AND EX**It's Time For Chatbot 2.0**

Speakers: Max Ball, Principal Analyst, Forrester William McKeon-White, Senior Analyst, Forrester

POWER CX WITH LEADERSHIP AND CULTURE**Optimize Your Team Or Function: Organizational Effectiveness Workshop**

Speakers: Betsy Summers, Principal Analyst, Forrester

DEVELOP INDUSTRY-SPECIFIC CX STRATEGIES**From Transactional To Trustworthy: Engaging Healthcare Customers**

Speakers: Arielle Trzcinski, Principal Analyst, Forrester Greg Barber, Director of Experience & Market Research, CareFirst Blue Cross Blue Shield Al Krueger, Senior Director, Experience Strategy, Research, and Design Practice, Highmark Health

GOVERNMENT**Transforming Public Service Experiences: Case Studies**

Speakers: Julie Young, Manager, Senior Consultant, Forrester

9:30 am – 10:00 am
CDT**Breakout Session****DESIGN FOR CONSUMERS' TOTAL EXPERIENCE****Drive Loyalty With An Engagement-Centric Approach**

Speakers: John Pedini, Principal Analyst, Forrester

10:45 am – 11:25 am
CDT**Marketplace Coffee Break & Networking (In-Person Only)**10:50 am – 11:20 am
CDT**Analyst-Led Roundtables (Pre-Registration Required)****Effectively Engaging Loyal Customers In Retail/Financial Services**

Speakers: John Pedini, Principal Analyst, Forrester

Keynote Q&A: The Network Effect Of AI Innovations

Speakers: Jay Pattisall, VP, Principal Analyst, Forrester

Thursday, Jun 26

11:35 am – 12:05 pm
CDT**Breakout Sessions****MEASURE YOUR WAY TO JOURNEY MASTERY****Work Smarter: Drive Growth With Customer Lifetime Value**

Speakers: Zeid Khater, Analyst, Forrester

LEVERAGE TECH FOR STELLAR CX — AND EX**Emerging Technology Dissolves The Barriers Between You And Your Customer**

Speakers: Brian Hopkins, VP, Emerging Tech Portfolio, Forrester

DEVELOP INDUSTRY-SPECIFIC CX STRATEGIES**Make The Case For CX In Government Organizations**

Speakers: Colleen Fazio, Senior Analyst, Forrester Judy Weader, Principal Analyst, Forrester

WOW CUSTOMERS WITH SEAMLESS STRATEGY AND OPERATIONS**Empowering Confident Customers**

Speakers: Kim Herrington, Senior Analyst, Forrester Erica Luxenburg, Director of Product Research, Lowe's

POWER CX WITH LEADERSHIP AND CULTURE**The Network Effects Of AI Create Powerful Experiences**

Speakers: Jay Pattisall, VP, Principal Analyst, Forrester

12:15 pm – 12:45 pm
CDT**Keynote: Navigate The Culture Risks Of Metrics**

Speakers: Angelina Gennis, Principal Analyst, Forrester

12:45 pm – 12:50 pm
CDT**Closing**

Speakers: Rick Parrish, VP, Research Director, Forrester