



INNOVATE

— BE MOVED —

Wednesday April 15th



Day 1 Agenda

11:00 AM

Registration

12:00 PM

Welcome Lunch

1:00 PM

Welcome to Innovate '26

Brian Wartes, SVP Sales, North America

1:10 PM

Be Moved: Shaping the Future of Human-Centered Experiences

Leigh Segall, CEO, Heidi Johnson, CPTO, Hitesh Bhindi, CCO

Leigh, Heidi, and Hitesh open Innovate 2026 with a shared perspective on the moments that shape trust, connection, and experience. Together, they set the tone for the days ahead, focused on impact, innovation, and what it takes to get customer experience right.

1:45 PM

From Capability to Connection: Getting More from Smart

Heidi Johnson, Chief Product & Technology Officer

Smart Communications has evolved into a powerful, connected portfolio, and this session is designed to help you get more out of your investment. We'll walk through the latest capabilities, show how they work together to support end-to-end customer journeys, and highlight practical ways you can use AI today to drive efficiency and deliver more meaningful experiences.

2:45 PM

Networking Break

3:15 PM

The Power of Human Connection: A Conversation with Industry Leaders

Featuring Bessemer Trust, Moter Insurance Services and more.

In this executive panel, leaders from healthcare, insurance, and financial services come together to explore the role of human connection in shaping modern customer experiences. Panelists will share their "why," the principles guiding their organizations, and the approaches they're taking to build meaningful, end-to-end experiences across the customer journey. From what they're focused on today to how they're preparing for the future, this conversation offers an inside look at how leading organizations are keeping customer-centricity at the heart of everything they do.

4:00 PM

The Next Era of Customer Engagement: Insights from IDC

Amy Machado, Senior Research Manager, Enterprise Content, IDC

IDC's Amy Machado shares insights on how customer expectations are evolving and what that means for communication experiences. Drawing on research and real-world examples, she'll explore the trends shaping trust, channel preferences, and the future of customer engagement — and what organizations should focus on next.

4:45 PM

Closing Remarks

Brian Wartes, SVP Sales, North America

5:00 PM

Welcome Reception *(JW Marriott)*

Thursday April 16th ▶▶ Day 2 Morning Agenda

8:30 AM

Welcome Back!

Brian Wartes, SVP Sales, North America

8:45 AM

What's Next: The Smart Communications Roadmap

Heidi Johnson, Chief Product & Technology Officer

This roadmap session looks ahead to what's coming next. We'll share where we're investing, how customer feedback is shaping our innovation priorities, and what you can expect over the year ahead as we continue building for the future of trusted customer experiences.

9:45 AM

AWS Gold Sponsor AWS Session

Details coming soon.

10:15 AM

Networking Break

10:45 AM

Leading with Empathy: The Model for Modern Member Experience

SarahKay Hermosillo, Sr. Director, End-to-End Member Experience Transformation,
Blue Shield of California

This session explores how leading with empathy is shaping the modern member experience. Through real examples from across the member journey, learn how putting people at the center, prioritizing moments that matter, and taking an experience-led approach are helping deliver more meaningful, trusted healthcare experiences.

11:15 AM

From Interaction to Experience: Raising the Bar on Customer Engagement

Featuring The Bancorp, Northern Trust, and CNA

As customer expectations rise, organizations are rethinking how interactions come together to form meaningful experiences. In this panel, leaders from insurance and financial services share how they're delivering more connected, experience-led engagement across the customer journey.

12:00 PM

Networking Lunch

1:15 PM

Vertical Breakouts – see page 4

Thursday April 16th ▶▶ Day 2 Afternoon Agenda

VERTICAL BREAKOUTS

	INSURANCE	FINANCIAL SERVICES	HEALTHCARE
1:15 PM	Transforming Policy Assembly for Better Customer Outcomes Learn how insurers are modernizing policy assembly to improve efficiency, accuracy, and consistency across the full policy lifecycle.	Transforming Forms into Conversations: Agentic AI in Data Collection Explore how financial services organizations are using agentic, conversational experiences to simplify data collection and improve client engagement.	Modernizing Operations: Member Communications as a Service See how Blue Shield of California is streamlining complex, regulated member communications with a flexible, service-based approach.
1:50 PM	Guidewire Silver Sponsor Session Join Guidewire for a look at how insurers are modernizing core operations and customer communications to support more connected, digital experiences.	Making it Stick: Lessons from Customers Who Built Real Momentum Hear directly from customers who turned early success into lasting adoption by building internal alignment and executive support.	Transforming Regulated Forms Without Compromise Learn how healthcare payers can deliver guided digital experiences while still meeting strict Medicare and Medicaid form requirements.
2:25 PM	Making Every Interaction Count: Elevating the Digital Insurance Journey Hear how insurers are creating more seamless, connected digital experiences that reduce friction and build trust across key moments of engagement.	Beyond Channels: Creating Connected, Outcome-Driven Client Experiences See a live, end-to-end financial services demo showing how connected interactions across the platform drive better client outcomes.	Mastering Complex Medicare Communications A practical deep dive into managing high-volume, high-stakes Medicare materials with confidence, accuracy, and compliance.
3:00 PM	Networking Break		
3:30 PM	Special Guest Keynote To be announced		
4:15 PM	2026 Innovate Awards Hitesh Bhindi, Chief Customer Officer		
6:00 PM	Enchanted After Dark <i>(offsite Soiree)</i> Prepare for an evening filled with unexpected magic. 6:00pm – 9:30pm		

Friday April 17th ▶▶ Day 3 Agenda

8:30 AM

Welcome Back!

Brian Wartes, SVP Sales, North America

8:45 AM

Listening to the Customer: Stories Inside the 2026 Benchmark Data

Scott Draeger, SVP, Product Marketing & Industry Solutions

This session offers a first look at key insights from our 2026 global Benchmark research, revealing how customer expectations are evolving across industries. We'll explore what customers say they need, value, and expect from their interactions with organizations — and what this means for businesses designing future-ready experiences.

9:15 AM

Designing the Path Forward: A Blueprint for Digital Evolution

Travis Fritts, Director of Architecture & Delivery, Shelter Mutual Insurance
Kurt Markus, Director of Application Innovation, Mountain West Farm Bureau

In this fireside chat, leaders from Mountain West Farm Bureau and Shelter Mutual share how they've mapped a clear path for digital evolution. They'll discuss where they started, the use cases that delivered early value, and how they've expanded their approach over time. The conversation will explore lessons learned, decisions that mattered most, and how they're planning for what's next as their digital strategies continue to evolve.

9:45 AM

Networking Break

10:15 AM

Peer-to-Peer Experience Labs

These interactive sessions bring customers together for open discussion on the topics that matter most. Choose the experience lab aligned to your priorities — from legacy technology migration and putting AI into practice, to building a Center of Excellence or driving digital adoption. Designed for peer-to-peer learning, these conversations focus on sharing real-world experiences, lessons learned, and practical takeaways.

11:15 AM

Looking Ahead: Moving from Insight to Action

This session brings Innovate full circle by focusing on what comes next. Drawing on insights from across the event, we'll share practical guidance to help you move from ideas to meaningful progress. Attendees will leave with clear next steps to begin applying what they've learned.

11:45 AM

Winners Circle: Building What's Next

Fireside Chat with Leigh Segall & our Innovate 2026 Award Winners

In this closing session, our customer award winners come together for a forward-looking conversation on what comes next. They'll share how they're building on recent success, where they're focused next in their transformation journeys, and what's guiding their priorities moving forward.

12:15 PM

Closing Remarks

Brian Wartes, SVP Sales, North America

12:30 PM

Boxed Launch To Go