



**INNOVATE**

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**SMART MOVES**

Wednesday April 23<sup>rd</sup>



# Day 1 Agenda

12:00 PM

Welcome lunch

1:00 PM

**Opening Remarks**

Hitesh Bhindi, Chief Customer Officer

1:10 PM

**The Moves that Matter Most: Planning for a Smarter Tomorrow**

Leigh Segall, Chief Executive Officer

1:30 PM

**Smart Moves Ahead: The Roadmap to Smarter Conversations, Part 1**

Simon Tindal, Chief Technology Officer

Martin Suter, Chief Product Officer

Richard Ward, Product Management Team Lead

2:30 PM

Networking Break

3:00 PM

**From Legacy to Leading-Edge: Smart System Modernization Panel Discussion**

Featuring CSAA, Amica, American Family Insurance, ACE, and Shelter Mutual

3:30 PM

**Manufacturing Urgency: Leading Bold Moves for a Smarter Future**

Tim Hays, Chief Information Officer, Mountain West Farm Bureau

4:00 PM

**Keynote: 5 Rules for CX Rockstars**

James Dodkins, CX Rockstar - Award Winning Speaker & Author

4:50 PM

**Closing Remarks**

Hitesh Bhindi, Chief Customer Officer

5:45 PM – 8:00 PM

## Smart Moves Kickoff Party

Start Innovate 2025 with a celebration you won't forget! We'll escort you to a surprise location, where you'll experience the best of New Orleans. Enjoy handcrafted cocktails, indulge in delicious local cuisine, and connect with industry peers in a lively, unforgettable setting. Don't miss this perfect blend of networking, flavor, and fun!

*\*Agenda subject to change.*

# Thursday April 24th



## Day 2 Agenda

7:30 AM

Networking Breakfast

8:30 AM

**Welcome Back!**

Hitesh Bhindi, Chief Customer Officer

8:45 AM

**The Future of CCM: What's Next and How to Prepare**

Scott Draeger, SVP Product Marketing & Industry Solutions

9:15 AM

**Smart Moves Ahead: The Roadmap to Smarter Conversations, Part 2**

Simon Tindal, Chief Technology Officer

Martin Suter, Chief Product Officer

Richard Ward, Product Management Team Lead

10:15 AM

Networking Break

10:45 AM

**Breakouts: Interactive Roundtable Sessions**

Choose the topic that interests you most and join the discussion! Available on a first-come first served basis.

11:45 AM

Networking Lunch

1:00 PM

**Quick Wins in Forms Automation: Why Transformation Matters More Than Ever**

Sally Schulte, Sr. Director Product Marketing

1:30 PM

**Smarter Data, Better Outcomes: A Panel Discussion**

Featuring Citizens Bank, The Bancorp, and One America Financial

2:15 PM

Networking Break

2:45 PM

**Transforming Customer Communications with GenAI: A Blueprint for Financial Services, Insurance, & Healthcare**

Terry Buechner, Global Core Systems Lead, AWS

3:15 PM

**What 'Great' Looks Like: Delivering the Experiences Your Customers Expect**

Mark Donohue, Founder & CEO, iSky Research

4:00 PM

**Smart Moves, Big Impact Awards Ceremony**

Winners to be Announced

6:00 PM – 9:30 PM

**SMARDI Gras Bash**

Get ready for a night to remember! We're whisking you away to a surprise location where you'll experience the true spirit of New Orleans—legendary flavors, live entertainment, and an atmosphere you won't find anywhere else.

*\*Agenda subject to change.*

Friday April 25<sup>th</sup>



# Day 3 Agenda

7:30 AM

Networking Breakfast

8:30 AM

**Opening Remarks**  
Hitesh Bhindi, Chief Customer Officer

VERTICAL BREAKOUTS

	INSURANCE	FINANCIAL SERVICES	HEALTHCARE
9:00 AM	<b>Insurance Leaders Panel: Navigating the Digital Shift</b> Featuring Brotherhood Mutual, Hippo, and ARAG North America	<b>Banking on Innovation: A Fireside Chat</b> Panelists to be Announced	<b>Elevating Member Experience: Trends &amp; Insights from Blue Shield of California</b> SarahKay Hermosillo, Sr. Director, End-to-End Member Experience Transformation
9:40 AM	Networking Break	Networking Break	Networking Break
10:10 AM	<b>The Future of Insurance Claims</b> Clay Burgess, Head of Product for Claims, Guidewire Software	<b>The Smart Path to Automation: Navigating Change in Financial Services</b> Scott Draeger, SVP Product Marketing & Industry Solutions	<b>Ensuring Health Equity: Meeting Accessibility and Compliance Mandates</b> John Zimmerer, VP Vertical Marketing, Healthcare

11:00 AM

**2025 Benchmark Research Preview: Smart Insights for Smarter Moves**  
Chris Murphy, VP, Product Marketing

11:30 AM

**Wrap-Up & Closing Remarks**  
Hitesh Bhindi, Chief Customer Officer  
Leigh Segall, Chief Executive Officer

11:45 AM

Boxed Lunch to go

*\*Agenda subject to change.*