



INNOVATE

SMART MOVES

Wednesday April 23rd



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

3:45 PM

2025 Benchmark Research Preview: Smart Insights for Smarter Moves

Chris Murphy, VP, Product Marketing

4:15 PM

Manufacturing Urgency: Leading Bold Moves for a Smarter Future

Tim Hays, Chief Information Officer, Mountain West Farm Bureau

4:45 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 25th



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

Insurance Leaders Panel: Navigating the Digital Shift

Featuring Brotherhood Mutual, Hippo, and ARAG North America

Banking on Innovation: A Fireside Chat

Panelists to be Announced

Elevating Member Experience: Trends & Insights from Blue Shield of California

SarahKay Hermosillo, Sr. Director, End-to-End Member Experience Transformation

9:40 AM

Networking Break

Networking Break

Networking Break

10:10 AM

The Future of Insurance Claims

Clay Burgess, Head of Product for Claims, Guidewire Software

The Smart Path to Automation: Navigating Change in Financial Services

Scott Draeger, SVP Product Marketing & Industry Solutions

Ensuring Health Equity: Meeting Accessibility and Compliance Mandates

John Zimmerer, VP Vertical Marketing, Healthcare

11:00 AM

Closing Keynote: 5 Rules for CX Rockstars

James Dodkins, CX Rockstar - Award Winning Speaker & Author

12:00 PM

Boxed Lunch to go

**Agenda subject to change.*