

REGISTER

100+ IA PRACTITIONER
SPEAKERS SOON TO COME!

ssn

Intelligent Automation Week

June 19 - 21, 2023

Chicago Marriott Downtown Magnificent Mile

intelligentautomation.iqpc.com

Unleash the Power
of IA to Provide
Enhanced Business
Outcomes **ACROSS
THE ENTERPRISE**

Operations & Process Improvement | Customer Experience, Call Centers, Marketing & Sales |
Finance, Procurement, GBS & Shared Services | Work Culture, HR & Talent Management | Technology

GET READY, SET, GO!

Welcome to the highly anticipated **Intelligent Automation Week** conference, taking place in Chicago, IL from June 19 - 21, 2023.

The first Intelligent Automation (IA) Week conference took place in 2016 and has grown exponentially over the past 8-years. Likewise, the intelligent automation space has evolved significantly over the years. Finance was one of the earliest adopters of intelligent automation. However, with the powerful business outcomes IA has offered early adopters over the years, it's been quickly adopted and implemented into such areas as HR, procurement, GBS, shared services, call centers, marketing, sales, and much more.

Intelligent automation has offered various lines of business enhanced process efficiency, accuracy, and speed – as well as impactful business insight and revenue generating opportunities – and we look forward to providing you the opportunity to learn how your organization can deliver enhanced business value **ACROSS THE ENTERPRISE**.



Jules Miller
Executive Producer &
Senior Market Analyst
**INTELLIGENT
AUTOMATION WEEK**



Marie DiTrapani
Vice President &
Principal Analyst
**INTELLIGENT
AUTOMATION WEEK**

EARN UP TO 15 CPE CREDITS & 14.5 SHRM CREDITS

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Prerequisites: Basic knowledge of business services within any industry

Advanced Preparation: None

Program Level: Intermediate



Join us in supporting the **Women In Technology (WIT)** non-profit and show your support by making an "in kind" donation to their wonderful organization.

SOMETHING FOR EVERYONE

The Intelligent Automation event is designed to address the IA topics you “truly” **NEED/WANT** to know more about, may you be sitting within a C-Suite, strategy, implementation, management, or in the trenches capacity, with respect to providing enhanced business value **ACROSS THE ENTERPRISE**.

Discover how to deliver enhanced business value across the enterprise utilizing a wide array of IA technologies, to increase revenue generation; improve sales, marketing, call center, and employee efficiency and productivity; enhance customer and employee experience; and to drive efficiency, accuracy, cost savings, transparency & business outcomes into your back, middle & front office operations.

OPERATIONS &
PROCESS IMPROVEMENT

CUSTOMER EXPERIENCE, CALL CENTERS,
MARKETING & SALES

FINANCE, PROCUREMENT, GBS & SHARED SERVICES

WORKFORCE CULTURE, HR & TALENT MANAGEMENT

TECHNOLOGY

OBJECTIVES TRACKING ICONS

To find sessions that address a particular objective, use the below Objectives Tracking Icons system. Each session will indicate the objectives the session will cover.

Cost Savings:

CS

Revenue Generation:

RG

Speed, Accuracy
& Productivity:

S, A&P

Employee, Customer
& User Experience:

EX, CX & UX

WHO SHOULD ATTEND & PAST ATTENDEES

C-Suites, Global Heads, Vice Presidents, Managing Directors, Directors, Leads & Leaders, Analysts, Managers - and much more within the below functional areas:

- Business Transformation
- Call Centers
- Customer Experience
- Digital Transformation
- Finance & Procurement
- Global Business Services (GBS)
- Human Resources, Talent Management, Employee Experience
- Operations
- Process Improvement & Excellence
- Sales & Marketing
- Shared Services
- Supply Chain & Distribution
- Technology
- **And much more!**

INDUSTRY BREAKDOWN

25% Banking, Finance & Insurance	6% Construction, Engineering, Mining, Energy, Oil & Gas
15% IT, Technology & Software	5% Transportation & Logistics
10% Medical Supplies, Pharmaceuticals, & Health Care	4% Manufacturing
9% Consulting	3% Aerospace & Defense
7% Food & Beverage	9% Other (Retail, Legal, Real Estate, Agriculture, etc.)
7% Media, Social Media & Entertainment	

SENIORITY BREAKDOWN

9% C-Suite
23% SVP, VP & AVP
34% Director
27% Manager
7% Other

WHAT YOUR PEERS HAVE SAID

"People should attend to learn how industry leaders are leveraging best practices and the latest technologies to automate their business."

 Meta

"Best conference I have ever attended! Comprehensive, hands on, collaborative and sustainable information."

 AIG

"It's a great opportunity to learn how other companies took the step forward on intelligent automation and get vendor options to do it."

 BEST
BUY

"Speakers and content were great. The information was relevant with concrete examples of real-life challenges."

BANK OF AMERICA 

"Great content and networking opportunities to meet colleagues that are on the same journey as us."

 gm

"Highly educational. It has been a fantastic opportunity to learn how others in our industry are leveraging intelligent automation."

 P&G

AUTOMATION ADVISORS

The Intelligent Automation Week Advisory Board members consist of intelligent automation decision makers from some of the most prestigious and innovative organizations. They are carefully selected based upon their IA expertise, job function, and strategic responsibility within their organization – so to ensure the event program covers the topics you "truly" **NEED & WANT** to know more about.



AJ Bernstein
Senior Director of
Finance Transformation
META

NEW



Amol Rajmane
Global Digital
Automation Technology
Leader
DUPONT

NEW



Brent Ruth
Lean Digital
Transformation Leader
CATERPILLAR

NEW



Camille Ready
Senior Director,
Corporate Data Delivery
& Enterprise Intelligent
Automation CoE
GEORGIA-PACIFIC

NEW



Christina Duta
Director, Intelligent
Automation - GBS
AECOM

NEW



Curt Burghardt
Vice President of People
Delivery
UNUM

NEW



Danilo McGarry
Global Head of
AI & Automation,
Digitization & Process
Transformation
ALTER DOMUS

NEW



Emmanuel Lai
Vice President -
Intelligent Automation
Program Leader
WELLS FARGO

NEW



Henry Lyles
Director, Global
Technology Solutions &
Intelligent Automation
CoE
MCDONALD'S



Lori Pon
Assistant Vice President,
Claims Transformation,
THE HANOVER
INSURANCE GROUP



Jeff Machols
Senior Vice President,
Continuous
Improvement
VOYA FINANCIAL

NEW



Jenica Casanova
Lead Automation
Product Manager -
Clinical
HUMANA

NEW



Max Ioffe
Director, Global
Intelligent Automation
CoE
WESCO
DISTRIBUTION



Laura Hendrix
Senior Vice President
& Director, RPA and
Process Improvement
FIRST HORIZON BANK

NEW

AUTOMATION ADVISORS



Lee Patsel
Senior Manager, Global
Service Management &
Governance
ADM
NEW



Matt Murphree
Assistant Vice President,
Employee Technology &
Enablement
GM FINANCIAL
NEW



Neeraj Mathur
Director, Intelligent
Automation
VMWARE



Patty Boland
Vice President & Senior
Architect, Intelligent
Process Automation
CITIZENS



Pete Persson
Director, Intelligent
Automation
ENERGY
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Rahul Trivedi
Vice President of
Intelligent Automation
TRANSUNION



Rameshwar Balanagu
Head of Digital
Strategy & Enterprise
Architecture
AVAYA
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Ryan Davis
Senior Vice President -
Procurement Strategy &
Innovation
BANK OF AMERICA



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Managing Director,
CoE, FM Operations @
Google for CBRE
CBRE



Steve Carpenter
Executive Director GBS
Digital
MERCK



Thomas Dixon
Senior Vice President
Consumer Continuous
Improvement, Process
Automation & AI
CITIZENS BANK
NEW

"IQPC's Intelligent Automation conference in Chicago had something for everyone: those still discovering the possibilities of RPA to seasoned practitioners running hundreds of bots seeking ways to mature their operations. These events provide a great place to learn and connect with others who are in the trenches."

BD

INSIGHTFUL SPEAKERS

The Intelligent Automation Week speakers consist of intelligent automation executives that possess a great wealth of experience, expertise, and insight into how to develop, execute, and scale a wide variety of intelligent automation initiatives, so to deliver enhanced business value across the enterprise.



Ryan Davis
Senior Vice President,
Procurement Strategy
& Innovation Executive
BANK OF AMERICA

IA WEEK CHAIRMAN



Christina Duta
Director, Intelligent
Automation - GBS
AECOM

NEW



Lee-Anne Ostby
Operational Excellence
Manager
META

NEW



**Carlos Manteiga
Bautista**
M.D., Chief Operating
Officer, Corporate &
Investment Banking
SANTANDER U.S.

NEW



Jack Deem
Assistant Controller
CON EDISON

NEW



Lee Patzel
Senior Manager, GBS
Service Management &
Governance
ADM



Henry Lyles
Director, Global
Technology Solutions &
Intelligent Automation
CoE
MCDONALD'S



Matthew Murphree
Assistant Vice President,
Employee Technology &
Enabement
GM FINANCIAL



Kelly McNeil
Senior Strategic
Program Director
**TRAVELNET
SOLUTIONS**

NEW



Anurag Voleti
Vice President & Chief
Data Officer
**BLUE CROSS BLUE
SHIELD ASSOCIATION**

NEW



Michael Hites
Chief Information Officer
**SOUTHERN
METHODIST
UNIVERSITY**

NEW



George Leu
Global Order Management
Smart Automation &
Strategic Programs Senior
Director – GBS
PROCTOR & GAMBLE

NEW



Swarna Kuruganti
Digital Innovation -
Operations
Transformation
**MOFFIT CANCER
CENTER**

NEW



Matthew Kelly
Senior Vice President,
Digital & Automation,
**NORTHERN TRUST
ASSET MANAGEMENT**

NEW



Isha Gulati
Expert Application
Engineer, BT - RPA
Technologies
**DISCOVER FINANCIAL
SERVICES**

NEW



Joshua Reicher
Chief Digital Officer
CENLAR

NEW



Zia Bhutta
Chief Executive Officer
& Partner
**ANAI CAPITAL
MANAGEMENT**

NEW



Robert Kennedy
Enterprise Technology
Architect, Server
Systems Enterprise
Architecture
RYDER SYSTEM

NEW



Amit Katewale
Senior Software Engineer
& Team Leader
SOUTHWEST AIRLINES

NEW



Kurt LaCroix
Chief Revenue Officer,
North America
DRUID.AI

NEW



Sameer Naik
Enterprise Analytics
Manager
CONAGRA BRANDS

NEW

INSIGHTFUL SPEAKERS



Bruce Orcutt
Senior Vice President of
Product Marketing
ABBYY

NEW



Angela McKeirnan
Director of Global
Procurement Center of
Excellence
DENTSPLY SIRONA

NEW



Dhruval Shah
Head of Robotics CoE
– New Technology
Development &
Innovation
AT&T

NEW



Glen Stambone
Lean Six Sigma
Master Black Belt
& Director, Project
Management Office
**BOEHRINGER
INGELHEIM**



Shelly Blakeman
Principal, Change
Management
DELTA DENTALS

NEW



Sherry Smith
Vice President, Center
for Operational
Transformation
AVIA HEALTH

NEW



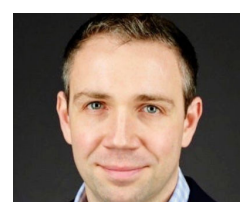
Tony Brooks
Director of Enterprise
Cloud Services
**UNIVERSITY OF
COLORADO**

NEW



Ravi Narasimhan
Vice President,
Information Technology
**UNITED HEALTH
GROUP – OPTUM**

NEW



David Houck
Senior Manager,
Automation Delivery
DISCOVERY FINANCIAL



Caleb Pearson
Vice President, Media &
Digital – U.S. Marketing,
MCDONALD'S

NEW



Phil Searle
Founder & CEO
CHAZEY PARTNERS



Benjamin Coblenz
Data and Technology
Manager
**AMERICAN FAMILY
INSURANCE**



Rahul Trivedi
Vice President of
Intelligent Automation
TRANSUNION

NEW



George Penton
Partner
SCOTTMADDEN



Marie DiTrapani
Vice President &
Principal Analyst
**INTELLIGENT
AUTOMATION WEEK**



Chuy Michael
RPA Lead – North
America
CHAZEY PARTNERS



Trey Robinson
Partner
SCOTTMADDEN



Andra Milender
Chief Mission Officer
- Community Impact
Programs & Former
Chief Technology Officer
**WOMEN IN
TECHNOLOGY (WIT) &
EQUIFAX**

NEW

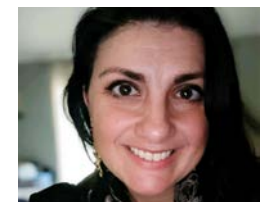


Todd Allen
Chief Strategy &
Innovation Officer
WSSC WATER

NEW



Steve Carpenter
Executive Director GBS
Digital
MERCK



Patty Boland
Vice President & Senior
Architect, Intelligent
Process Automation
CITIZENS

INSIGHTFUL SPEAKERS



Pete Persson
Director, Intelligent
Automation
ENERGY



Curt Burghardt
Vice President of People
Delivery
UNUM
NEW



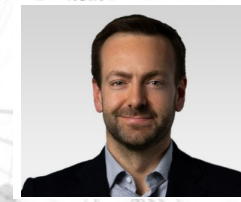
Andrew Enderle
Senior Process
Automation &
Technology Analyst
**AMERICAN FAMILY
INSURANCE**



AJ Hanna
Senior Vice President
- Transformation &
Automation
CORONIS HEALTH
NEW



Julie Jones
Senior RPA Developer
**SOUTHWEST
AIRLINES**
NEW



Zak Kasza
Director, Digital
Marketing Strategy
MCDONALD'S



Jeff Machols
Senior Vice President,
Continuous
Improvement
VOYA FINANCIAL



Danilo Barbosa
Digital Transformation
Manager - Finance
Innovation
META
NEW



Tamra Butler
Senior Manager, Robotic
Process Automation
SOUTHWEST AIRLINES
NEW



Christina Custis-Thomas
Director, Cross Functional
Operations Team &
Administrative Services,
Allstate Benefits
ALLSTATE
NEW



Jules Miller
Executive Producer &
Senior Market Analyst
**INTELLIGENT
AUTOMATION WEEK**



Lee Coulter
Godfather of IA & Chief
Digital Officer
ACRESIS
NEW



David Friedman
Head of Intelligent
Automation CoE
RYDER SYSTEM
NEW



Emmanuel Lai
Vice President -
Intelligent Automation
Program Leader
WELLS FARGO



Tara King
Director of quality
Assurance
MERCK



Shail Khiyara
President
VOCAL
NEW



Camille Ready
Senior Director,
Corporate Data Delivery
& Enterprise Intelligent
Automation CoE
GEORGIA-PACIFIC
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Sam Aborne
Managing Director,
CoE, FM Operations @
Google for CBRE
CBRE



Max Ioffe
Director, Global
Intelligent Automation
CoE
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Julio Viquez
Senior Manager
Intelligent Automation
VMWARE
NEW



Thomas Dixon
Senior Vice President
Consumer Continuous
Improvement, Process
Automation & AI
CITIZENS BANK
NEW

INSIGHTFUL SPEAKERS



Ramana Rao
Director, GBS Digital
NEWELL BRANDS



Erik Lien
Chief Executive Officer
RPA SUPERVISOR



Brad DeMent
Partner
SCOTTMADDEN
NEW



Neeraj Mathur
Director, Intelligent
Automation
VMWARE



Artem Laryguine
Chief Executive Officer
AGE2B
NEW



Russell Michna
Managing Director, U.S.
& Canada
CHAZEY PARTNERS



Jordane Barochez
Vice President
Operations, Finance,
Analytics & Automation
MASTERCARD
NEW



Bill Galusha
Vice President, Product
Marketing
ABBYY
NEW



Cedwyn Bachman
SME & Account
Executive
RPA SUPERVISOR



Jason Iffrig
Director Software
Engineering
MASTERCARD
NEW



Matthew Matousek
Vice President - Digital
Transformation
OPTUM
NEW



Shannon Geegan-
Katcher
PMP, GISP, Vice
President, Digital
Innovation
GTI ENERGY
NEW



Ryan Davis
Senior Vice President -
Procurement Strategy &
Innovation Executive
BANK OF AMERICA



Paul Bartley
Senior Director of
Finance
BAXTER
NEW



Mariesa Coughanour
Head of Advisory, NA
Delivery & Mindshare
**COGNIZANT
AUTOMATION**



Ajay Jindal
Senior Director of
Automation CoE,
LEXISNEXIS
NEW



Anand Parankussam
Director of RPA CoE,
ADIENT
NEW



Andrew Lamadline
Senior Director & Digital
Workforce Product
Owner
KOCH INDUSTRIES
NEW



Tim Bracken
Director of Automation
- Innovation Institute,
GEISINGER
NEW



Emily Fry
Vice President,
Innovation Operations,
GEISINGER
NEW



Jyoti Nigam
Senior Vice President
- Chief Operational
Practice Excellence
NORTHERN TRUST
NEW

INSIGHTFUL SPEAKERS



Hari Busarapu
Senior Director - Digital Transformation
OPTUM ADVISORY SERVICES

NEW



Armando Lambert
Vice President, Enterprise Optimization
BAYVIEW ASSET MANAGEMENT

NEW



Lance Griffith
Vice President of Global Architecture
CORONIS HEALTH

NEW



Paula Bolton
Chief Marketing & Program Officer
WOMEN IN TECHNOLOGY (WIT)

NEW



Ahmed Zaidi
Chief Executive Officer,
ACCELIRATE



Stephen Nielson
MHA, Manager of Digital Health
MERCYONE

NEW



Rayna Walker
Senior Manager, GBS Tech Apps
KELLOGG COMPANY

NEW



Ram Tyagi
Vice President & Head of Investment Operations Technology
HARRIS ASSOCIATES

NEW



Dr. Ian Swift
Director Technology Digital & Data
MGM RESORTS

NEW



Bill Arneson
Director, Revenue Cycle & Support Service
MOFFITT CANCER CENTER

NEW



Bhadra Parmar
Global Procurement Leader, Global Supplier Management
MERCK & CO., INC.

NEW



Harsh Phuloria
Director, Enterprise Automation Strategy
CONVERSE @ NIKE, INC.

NEW



Asad Nabi
Chief Enterprise Architect & Head of Architecture, Integration & Automation
LIBERTY LATIN AMERICA

NEW



Antti Karjalainen
Chief Executive Officer
ROBOCORP



UNLEASH THE POWER OF IA TO PROVIDE ENHANCED
BUSINESS OUTCOMES ACROSS THE ENTERPRISE

AGENDA

AGENDA AT-A-GLANCE

AUTOMATION WORKSHOPS & MASTERCLASSES | MONDAY, JUNE 19, 2023

10:00am	REGISTRATION FOR PRE-CONFERENCE WORKSHOPS & MASTERCLASSES	1:00pm	NETWORKING LUNCHEON	5:00pm	WELCOME RECEPTION & EARLY PREVIEW OF THE IA INNOVATION HUB
10:30am	CHAIRMAN'S OPENING REMARKS & NETWORKING ICEBREAKER	2:00pm	WORKSHOPS E & F	6:00pm	NIGHT ON THE TOWN DINNER PARTIES & OFF-SITE EXPERIENCES
11:00am	WORKSHOPS A & B	3:00pm	"REBOOT" NETWORKING BREAK		
12:00pm	WORKSHOPS C & D	3:30pm	MASTERCLASSES A & B		

MAIN CONFERENCE DAY 1 | TUESDAY, JUNE 20, 2023

7:30am	REGISTRATION FOR MAIN CONFERENCE & NETWORKING BREAKFAST	9:50am	USE CASE FIRESIDE CHAT: THE BOLD, TENACIOUS, CHANGE MAKERS – TRANSFORMING A WAY OF WORKING EVEN IN TODAY'S CONTEMPORARY BUSINESS LANDSCAPE WITH AUTOMATION	3:55pm	CLIENT USE CASE: PROVIDING BUSINESS VALUE TO YOUR CUSTOMERS BY BEING THEIR IA "TRUSTED ADVISOR"
8:30am	SSON WELCOME ADDRESS & ANNOUNCEMENT OF THE IA WEEK CHICAGO "BEST IN CLASS" AWARDS			4:25pm	PANEL DISCUSSION: UNLEASHING HYPERAUTOMATION TO OPTIMIZE IA SOLUTIONS ACROSS THE ENTERPRISE THROUGHOUT & BEYOND THE RECESSION
8:40am	CHAIRMAN'S OPENING REMARKS & NETWORKING ICEBREAKER	10:20am	"REBOOT" NETWORKING BREAK IN THE IA INNOVATION HUB		
8:50am	C-SUITE PANEL DISCUSSION: IA THROUGH THE LENS OF THE C-SUITE SO TO BETTER UNDERSTAND THEIR RECESSION PLANNING & FUTURE IA STRATEGIES AND GENERATIVE AI STRATEGIES	11:00am	IDGS (INTERACTIVE DISCUSSION GROUPS)	5:15pm	CHAIRMAN'S CLOSING REMARKS
		12:45pm	NETWORKING LUNCHEON	5:20 pm	WELCOME RECEPTION
		1:45pm	TRACK SESSIONS		
9:20am	CLIENT USE CASE: TAKING OWNERSHIP OF YOUR AUTOMATION ENVIRONMENT	3:25pm	"REBOOT" NETWORKING BREAK AND IA "TWO TRUTHS & ONE LIE" GAME		

MAIN CONFERENCE DAY 2 | WEDNESDAY, JUNE 21, 2023

7:30am	NETWORKING BREAKFAST	9:45am	FIRESIDE CHAT: LIBERTY LATIN AMERICA'S IA JOURNEY	3:25pm	"REBOOT" NETWORKING BREAK AND IA TRIVIA CHALLENGE
8:30am	CHAIRMAN'S OPENING REMARKS & NETWORKING ICEBREAKER	10:00am	"REBOOT" NETWORKING BREAK	3:45pm	PANEL DISCUSSION: EMBEDDING IA INTO IA SYSTEMS SHUT DOWN STRATEGIES TO ENSURE PROCESS EXCELLENCE & BUSINESS CONTINUITY
8:45am	PANEL DISCUSSION: ESTABLISHING IA VALUE WITH YOUR CLIENTS IS AN ONGOING NECESSITY TO ENSURE CX EXCELLENCE	11:00am	TRACK SESSIONS		
		12:35pm	NETWORKING LUNCHEON		
9:15am	USE CASE PANEL DISCUSSION: CHATGPT & MANAGED SERVICES ENABLING IA & SCALED RPA PROGRAMS	1:35pm	BUILDING THE BUSINESS CASE ROUNDTABLES	4:15pm	IA ACCOUNTABILITY BUDDY HUDDLES
				4:45pm	CHAIRMAN'S CLOSING REMARKS
				5:00pm	CONFERENCE CONCLUDES

AUTOMATION WORKSHOPS & MASTERCLASSES

MONDAY, JUNE 19, 2023

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& SPEAKERS

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PRICING &
REGISTRATION

10:00am

REGISTRATION FOR PRE-CONFERENCE WORKSHOPS & MASTERCLASSES - pre-registration required

**Pre-Event Meet Up at
7pm on Sunday, June 18!**

Details will be provided upon
registration.

10:30am

CHAIRMAN'S OPENING REMARKS * NETWORKING ICEBREAKER

Kick off your overall IA Week experience on a great note by participating in the fun and engaging "5 Things in Common" icebreaker we have in store for you!

Chairman, **Ryan Davis**, Senior Vice President - Procurement Strategy & Innovation Executive, **BANK OF AMERICA**

11:00am

WORKSHOP A: DEVELOPING IMPACTFUL IA TALENT RECRUITMENT & RETAINMENT STRATEGIES TO ENSURE IA PROGRAM SUCCESS

It's never been easy to recruit and retain top IA talent. Throw into the mix the Great Resignation and surge in digital transformation initiatives throughout the enterprise, and now it's even more difficult to find, keep, and engage qualified IA talent to fulfill labor market demands. That said, as most organizations are leaning on IA to provide increased business value to their various lines of business, solving the IA talent shortage Rubik's Cube needs to be regarded as a mission critical matter.

In this deep dive, collaboration workshop, the speakers and attendees will discuss and work through the below matters:

- Developing innovative, creative, and attractive workforce recruitment and retainment initiatives
- Exploring various workforce engagement programs and how they can reduce employee turnover and increase productivity, engagement, and employee job satisfaction
- Internships and Citizen Development programs - as strategies vs. band-aid solutions
- Identifying internal workforce candidates that have the personality, key attributes, and growth potential to take on new responsibilities – and how to develop their skill sets and career development roadmaps on a short and long-term basis
- IA tools and employee surveys to track, measure, and benchmark workforce recruitment efforts and employee satisfaction results

Objective...To develop impactful IA talent shortage solutions.

Takeaway...Various methods to better address the IA talent shortage problem.

Benjamin Coblentz, Data and Technology Manager, **AMERICAN FAMILY INSURANCE**

CS

S, A&P

EX, CX & UX

WORKSHOP B: ASSEMBLING AN EFFECTIVE AUTOMATION TOOLKIT THAT FULFILLS YOUR EVOLVING IA PROGRAM OBJECTIVES

While a seasoned tradesman never blames their tools, there's something to be said about using the right tool for the right job. There's certainly a wide variety of IA tools to choose from these days and having a keen understanding of their capabilities, restrictions, costs, and benefits is of utmost importance prior to selection and usage.

In this deep dive, collaboration workshop, the speakers and attendees will discuss and work through the below matters:

- Breaking down the differences between nice-to-have versus must-have IA tools - and at various stages of an automation journey
- Evaluating the true capabilities of your business and tying this back to the IA vendor landscape, so to best match your business needs with appropriate IA solutions
- Mapping out how different IA toolkits may evolve based upon different business needs

Objective...To better understand the IA vendor landscape - and how to select the right IA tools for your business needs.

Takeaway...A blueprint that matches IA tools to your business needs and capabilities.

Bradley DeMent, Partner, **SCOTTMADDEN**

Trey Robinson, Partner, **SCOTTMADDEN**

George Penton, Partner, **SCOTTMADDEN**

Hosted by: **SCOTTMADDEN**

CS

RG

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AUTOMATION WORKSHOPS & MASTERCLASSES

MONDAY, JUNE 19, 2023

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& SPEAKERS

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PRICING &
REGISTRATION**WORKSHOP C: CREATING AN APPROPRIATE ECOSYSTEM TO ADVANCE YOUR ORGANIZATION'S INTELLIGENT AUTOMATION JOURNEY**

This session will take an in-depth look at the critical success factors to ensure a successful automation program. Learn how to identify which solutions and KPIs should be implemented to identify and prioritize automation candidates, and measure and manage the success of deployed automations. Select the best operating model to ensure that you are making the right investments at the right time, leveraging the most appropriate tools for your needs and goals.

In this session, topics of discussion will include, yet will not be limited to:

- Working with new service partnership frameworks, both internally with the business and IT, and externally with third parties
- Identifying artificial intelligence and machine learning (AI/ML) solutions and KPIs, for new and existing automation opportunities
- Selecting the right intelligent automation operating model for your organization
- Rolling out ML driven orchestration to deployed automations

Objective...Obtaining a better understanding of the overall IA ecosystem.

Takeaway...How to leverage enterprise-wide governance models to support and scale automation. How to make sound AI & ML investments choices, whilst also leveraging additional "low code", and cost efficient tools.

Phil Searle, *Founder & CEO*, **CHAZEY PARTNERS**

Russell Michna, *Chief Financial Officer*, **CHAZEY PARTNERS**

Chuy Michael, *RPA Lead - North America*, **CHAZEY PARTNERS**

Hosted by: **CHAZEY PARTNERS**

CS

S, A&P

EX, CX & UX

WORKSHOP D: CITIZEN DEVELOPMENT RISKS, OVERSIGHT & POTENTIAL REWARDS

Citizen Development programs have certainly bridged the IA talent shortage gap in recent years. However, when NON-technical workforces can build workflow apps with very little effort, cost, and oversight, strong governance must be in place, so to ensure the rewards outweigh the risks.

In this deep dive, collaboration workshop, the speakers and attendees will discuss and work through the below matters:

- Workflows that could or should NOT be touched by Citizen Development programs
- Governance and CoE involvement – and who should ultimately own Citizen Development programs taking place within functional silos
- Avoiding inefficient workflows, process logic errors, poor design, redundancy, and business impact insufficiency
- Identifying and upskilling workforces to be Citizen Developers - and perhaps your organization's new generation of IA talent!

Objective...To better understand the potential risks and rewards of Citizen Development programs.

Takeaway...Playbook of Citizen Development best practices.

Neeraj Mathur, *Director, Intelligent Automation*, **VMWARE**

CS

RG

S, A&P

NETWORKING LUNCHEON

Join your IA peers for lively conversations over lunch.

"The conference was extremely informative and I appreciated being able to hear from the IA software providers and my peers. I'm excited about exploring IA further to determine applicability for our organization."

MARS

AUTOMATION WORKSHOPS & MASTERCLASSES

MONDAY, JUNE 19, 2023

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PRICING &
REGISTRATION**WORKSHOP E: IDP (INTELLIGENT DOCUMENT PROCESSING) TO BOOST PROCESS EFFICIENCY ACROSS THE ENTERPRISE**

In recent years, organizations and the world at large have been moving away from paper. As a result, digital information and assets have increased exponentially over the past few years - and are forecasted to keep rising. How does this effect industries and functional areas that are inherently paper heavy, require a "paper trail", and need to cross reference and analyze various documents as part of overall workflows - such as finance, claims handling, healthcare, procurement, and much more? It effects them significantly. Yet thank goodness there are automation tools such as IDP (intelligent document processing), that can convert unstructured and semi-structured data - which in turn can be converted into structured, usable information, providing end-to-end automation to document-centric processes.

In this deep dive, collaboration workshop, the speakers and attendees will discuss and work through the below matters:

- What is IDP, is the simple answer: it's the eyes, ears, and brains of processing digital documents and information?
- Which functional areas of an organization would be best suited for IDP – and what are some common use cases?
- What type of digital documents, information, and assets can be processed by IDP?
- How can IDP drive cost reduction, process efficiency, and improve customer experience?

Objective...To understand what IDP is and how it can be applied across the enterprise.

Takeaway...A beginner and intermediate understanding of IDP.

Ram Tyagi, Vice President & Head of Investment Operations Technology, HARRIS ASSOCIATES

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WORKSHOP F: FINDING THE "BEST FIT" METHODS TO ACCURATELY MEASURE "YOUR" ORGANIZATION'S IA OUTCOMES & ROI

With many IA technologies and use cases becoming mainstream over the past few years, some might think it's surprising "the measuring IA ROI" formula still hasn't been mastered or universally developed. Why is that? It's because every IA initiative is different, with respect to objectives, utilized technologies, workforce capacity, IT infrastructures, budgets, scope, and more. If that's the case, then how can you report on your IA ROI when there's so many variables to consider?

In this deep dive, collaboration workshop, the speakers and attendees will discuss and work through the below matters:

- How to develop effective project roll out roadmaps, metrics, KPIs, and methods to clearly represent the soft and tangible value IA can provide to a wide variety of process improvement projects
- Various methods to determine IA ROI – what are they and how to do "the math"
- Effectively educating your IA customers and stakeholder that there's no "one size fits all" with respect to determining IA ROI

Objective...To develop a "measuring IA ROI" formula that works best for your organization and its various IA initiatives.

Takeaway...A "measuring IA ROI" playbook that includes several different ways to measure your organization's various IA initiatives.

Glen Stambone, Lean Six Sigma Black Belt & Director, Project Management Office, BOEHRINGER INGELHEIM

RG S, A&P

"REBOOT" NETWORKING BREAK

Reboot by enjoying some light snacks and beverages while meeting up with your peers.

2:00pm

3:00pm

AUTOMATION WORKSHOPS & MASTERCLASSES

MONDAY, JUNE 19, 2023

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PRICING &
REGISTRATION**MASTERCLASS A: NECESSARY REQUIREMENTS TO SCALE UP SUCCESSFUL IA PROGRAMS**

After an IA program has been successfully rolled out, may it have been a small to mid-sized program within a functional silo, office, or region, the next natural step would be to branch out with the successful IA initiative, so to offer additional functional areas, and/or....additional office locations the same or similar program benefits obtained thus far. However, before plunging into the IA scaling up arena, a lot of additional steps, aside from the actual IA program planning and roll out steps, need to be performed, so to ensure scaling up in other functional areas, offices, or regions indeed makes sound business sense.

In this deep dive, collaboration workshop, the speakers and attendees will discuss and work through the below matters:

- Key factors to consider, such as having a solid foundation and action plan with respect to business objectives, workforce capacity, and technical & infrastructure requirements
- Challenges, trade-offs, recommendations, and best practices to establish a variety of scalable IA initiatives
- Setting up the governance, operating, and support models for scalable IA programs

Objective...To assess if IA scalability is feasible.

Takeaway...A developed IA scalability roadmap.

Rahul Trivedi, Vice President of Intelligent Automation, **TRANSUNION**

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MASTERCLASS B: PROCESS MINING TO OBTAIN DATA-DRIVEN ANALYSIS OF PROCESSING BOTTLENECKS & BOOST PROCESS EXCELLENCE

Process mining is a powerful tool that digs deep into various types of processing bottlenecks, most especially the ones that cause poor performance. It leverages a data-approach to process optimization, allowing process improvement and other stakeholders to remain objective in their decision-making around resource allocation for existing processes.

In this deep dive, collaboration workshop, the speakers and attendees will discuss and work through the below matters:

- The various types of process mining - and how they can boost process excellence
- What are the differences between process mining, data mining, and business process management – and what are the common implications and benefits
- Industries and functional areas process mining is best suited for
- How to obtain process mining buy-in and developing a marketable PoC

Objective...To obtain a better understanding of what process mining is - and how it can offer enhanced process improvement to various functional areas within an enterprise.

Takeaway... An intermediate and advanced understanding of process mining

Lee-Anne Ostby, Operational Excellence Manager, **META**

Danilo Barbosa, Digital Transformation Manager - Finance Innovation, **META**

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WELCOME RECEPTION & EARLY PREVIEW OF THE IA INNOVATION HUB

Join your peers for an early preview of the highly anticipated reveal of the IA Innovation Hub.

NIGHT ON THE TOWN DINNER PARTIES & OFF-SITE EXPERIENCES

Venture past the hotel and choose from a variety of engaging off-site dinner parties and experiences.

3:30pm

5:00pm

6:00pm

MAIN CONFERENCE: DAY ONE

TUESDAY, JUNE 20, 2023

7:30am

REGISTRATION FOR MAIN CONFERENCE & NETWORKING BREAKFAST

8:30am

SSON WELCOME ADDRESS & ANNOUNCEMENT OF THE IA WEEK "BEST IN CLASS" AWARDS

Jules Miller, Executive Producer & Senior Market Analyst, **INTELLIGENT AUTOMATION WEEK**Marie DiTrapani, Vice President & Principal Analyst, **INTELLIGENT AUTOMATION WEEK**

8:40am

CHAIRMAN'S OPENING REMARKS & NETWORKING ICEBREAKER

Chairman, Ryan Davis, Senior Vice President - Procurement Strategy & Innovation Executive, **BANK OF AMERICA**

8:50am

C-SUITE PANEL DISCUSSION: IA THROUGH THE LENS OF THE C-SUITE SO TO BETTER UNDERSTAND THEIR RECESSION PLANNING & FUTURE IA AND GENERATIVE AI STRATEGIES

Better understanding how the C-Suite regards IA and generative AI technologies, initiatives, and budgetary spend would undoubtable provide you with highly valuable and actionable business insight. By aligning your IA projects with your C-Suite's IA and generative AI business objectives, strategic roadmaps, and budgets, your organization will be steps ahead of achieving its short and long-term business objectives. Furthermore, by looking at IA through the lens of the C-Suite, you'll be able to develop and manage IA and generative AI initiatives that are business-centric from the bottom up. In this session, a variety of cross-functional C-Suites will be asked the below questions:

- Which areas of the business have you found IA and generative AI have the potential to provide the greatest business outcomes?
- Which IA technologies do you feel are worth the short and long-term investment?
- Do you envision a shift in how IA programs will be managed in the future - on an IA leadership, organizational structure, teams, and budgetary level?
- How can IA teams get a better sense of their organization's C-Suite ongoing and future IA and generative AI initiatives and investments plans?

Ryan Davis, Senior Vice President - Procurement Strategy & Innovation Executive, **BANK OF AMERICA**Carlos Manteiga Bautista, M.D., Chief Operating Officer, Corporate & Investment Banking, **SANTANDER U.S.**Anurag Voleti, Vice President & Chief Data Officer, **BLUE CROSS BLUE SHIELD ASSOCIATION**Andra Milender, Chief Mission Officer - Community Impact Programs & Former Chief Technology Officer, **WOMEN IN TECHNOLOGY (WIT) & EQUIFAX**Moderator: Lee Coulter, Godfather of IA & Chief Digital Officer, **ACRESIS**

CS RG S, A&P EX, CX & UX

9:20am

CLIENT USE CASE: EASILY EXPAND YOUR IA CAPABILITIES WITH THE FLEXIBILITY OF A PAY-AS-YOU-GO ECOSYSTEM

Kim Meredith of Sysco Foods will share details of how her team is leveraging flexible, usage-based models to boost RPA capacity on-demand, and to explore and implement new IA technologies with no up-front commitment and cost. By attending this session, you'll walk away from the session with practical advice on how you can gain greater control and future-proof your automation program to solve business problems and drive greater value.

Kim Meredith, Chief Director, Intelligent Automation Enterprise Technology, **SYSCO**Erik Lien, Chief Executive Officer, **C TWO**Hosted by: **C TWO**

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MAIN CONFERENCE: DAY ONE

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PRICING &
REGISTRATION**USE CASE FIRESIDE CHAT: THE BOLD, TENACIOUS, CHANGE MAKERS – TRANSFORMING A WAY OF WORKING EVEN IN TODAY'S CONTEMPORARY BUSINESS LANDSCAPE WITH AUTOMATION**

The journey to transform an organization requires a combination of leadership, perseverance, and compassion. Growth and development are integral parts of why companies are looking to change how they work; be that simplifying, standardizing, modernizing or empowering. In doing so, bringing their people along the journey is a pivotal foundational component for success. Leaders need to define a strategy that combines support for organizational change, while balancing the evolution of processes, and future proofing of technology landscapes.

In this MGM use case session, topics of discussion will include, yet will not be limited to:

- Considerations for reinvigorating your suite of technologies
- Empowering employees in both business and IT to embrace new-age digital technologies to simplify how they work and achieve better outcomes for their teams
- Approaching challenges with a more creative and flexible mindset
- Industry views on what is next and what is critical to ready your organizations for tomorrow

Dr. Ian Swift, *Director Technology Digital & Data*, **MGM RESORTS**

Moderator: **Mariesa Coughanour**, *Head of Advisory, NA Delivery & Mindshare*, **COGNIZANT AUTOMATION**

Hosted by: **COGNIZANT AUTOMATION**

CS RG S, A&P EX, CX & UX

"REBOOT" NETWORKING BREAK IN THE IA INNOVATION HUB

Reboot by enjoying some light snacks and beverages while meeting up with your peers – and be sure to also visit the IA solution providers located within the IA Innovation Hub!

9:50am

10:20am



MAIN CONFERENCE: DAY ONE

TUESDAY, JUNE 20, 2023

IDGS (INTERACTIVE DISCUSSION GROUPS) - pre-registration required

Discuss, debate, brainstorm, and problem solve common IA use cases and hurdles amongst your peers. Three rounds of 30-minute IDGs. Select three (3) IDGs to attend.

Round #1: 11:00am – 11:30am

Round #2: 11:35am – 12:05pm

Round #3: 12:10pm – 12:40pm

IDG #1: CREATE SMARTER & FASTER PROCESS HANDLING

- Utilize (IPA) Intelligent Process Automation) to drive improved cost savings, efficiencies & accuracy into the enterprise
- Enhance a wide range of business processes across the enterprise
- Provide impactful data to internal customers and obtain straight through processes management

Andrew Lamadline, Senior Director & Digital Workforce Product Owner, **KOCH INDUSTRIES**

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IDG #2: CHALLENGES, SOLUTIONS & BREAKTHROUGHS OF UTILIZING GENERATIVE AI WITHIN THE ENTERPRISE

- Find the right response using generative AI for self service operations
- Customer support challenges and increase customer satisfaction
- Helpdesk automations to decrease call center overload

Kurt LaCroix, Chief Revenue Officer, North America **DRUID.AI**

Hosted by: **DRUID.AI**

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IDG #3: INCREASE INFORMATION PROCESSING TURNAROUND, INTEGRITY & COMPLIANCE

- Leverage IDP (Intelligent Document Processing) to drive cost reduction, process efficiency
- Unlock structured & structured data and obtain valuable business insight
- Process complex processes more efficiently
- Ensure compliance

David Houck, Senior Manager, Automation Delivery, **DISCOVERY FINANCIAL**

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IDG #4: CHATGPT RISKS & REWARDS

- Round 1: Igniting Finance
- Round 2: Reshaping Marketing
- Round 3: Enhancing HR Operations

Lance Griffith, Vice President of Global Architecture, **CORONIS HEALTH**

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IDG #5: MAX OUT AUTOMATION WITH PROCESS MINING AND INTELLIGENT DOCUMENT PROCESSING

- Responding to changing business requirements
- Getting more value from your business content
- Ensuring your process perform, today and tomorrow

Bruce Orcutt, Senior Vice President of Product Marketing, **ABBYY**

Hosted by: **ABBYY**

S, A&P EX, CX & UX

IDG #6: REVAMPING IA VENDOR MANAGEMENT STRATEGIES TO OPTIMIZE IA INVESTMENTS THROUGHOUT THE RECESSION & BEYOND

- IA licensing cost analysis & benefit analysis
- Agreements' review and analysis – and how to cut ties with IA platforms when need be

Jyoti Nigam, Chief Operational Practice Excellence, **NORTHERN TRUST**

CS S, A&P EX, CX & UX

IDG #7: ACHIEVE ENTERPRISE BUSINESS OBJECTIVES AT REDUCED COSTS

- Citizen Development governance
- Who's doing what, who should own Citizen Development programs, and how to ensure optimized business outcomes

Isha Gulati Expert Application Engineer, BT - RPA Technologies, **DISCOVER FINANCIAL SERVICES**

CS RG S, A&P EX, CX & UX

IDG #8: TRANSITION YOUR COE INTO A ENTERPRISE DELIVERY MODE

- Expanding your IA scope and service delivery
- Regression testing
- Technical and team requirements

Julie Jones, Senior RPA Developer, **SOUTHWEST AIRLINES**

Amit Katewale, Senior Software Engineer & Team Leader, **SOUTHWEST AIRLINES**

RG S, A&P EX, CX & UX

12:45pm

NETWORKING LUNCHEON

Join your IA peers for lively conversations over lunch.

MAIN CONFERENCE: DAY ONE

TUESDAY, JUNE 20, 2023

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PRICING &
REGISTRATIONOPERATIONS & PROCESS
IMPROVEMENT

(located within Innovation Hub)

USE CASE: CITIZEN
DEVELOPERS – THE
EVOLUTION OF SUCCESS AT
MOFFITT CANCER CENTER

In this used case session, topics of discussion will include, yet will not be limited to:

- An interesting start with a secret ingredient
- Evolving an atypical model
- Critical criteria that fed their story and enterprise scaling

Swarna Kuruganti, *Digital Innovation - Operations Transformation*,
MOFFITT CANCER CENTER

Bill Arneson, *Director, Revenue Cycle & Support Service*, **MOFFITT CANCER CENTER**

CS RG S, A&P EX, CX & UX

CUSTOMER EXPERIENCE, CALL
CENTERS, MARKETING & SALES

(located within Innovation Hub)

USE CASE: MCDONALD'S
MARKETING IA TECH
STACKS TO ENHANCE THEIR
MARKETING CAMPAIGN
EFFORTS, ENHANCE CX &
PROVIDE VALUABLE BI TO
OTHER LINES OF BUSINESS

Over the past few years, many marketing teams have been looking to IA technologies to optimize their marketing efforts, so much so that it's now a mainstream marketing practice. RPA-based marketing automation tools can certainly streamline, automate, and measure marketing tasks and workflows. However, when combined with various other IA technologies, such as AI, ML, NLP, chat bots, and more, not only can marketing greatly benefit from improved business outcomes, yet it can also offer enhanced CX and highly valuable BI to such functional areas as customer service, product R&D, sales, procurement, supply chain, logistics, distribution, and more.

In this session, topics of discussion will include, yet will not be limited to:

- Determining which IA technologies would best support your marketing business needs and objectives and could do so for other lines of business – and in turn should be included in your overall marketing IA and IT tech stack
- Marketing automation tech stacks that could provide optimized end-to-end marketing process improvements, workflows, data insights - and impactful customer experience journey maps
- How to best measure the marketing and cross-functional business insights and business outcomes derived from a multi-platform marketing IA tech stack – and how to align cross-functional KPIs and metrics

Zak Kasza, *Director, Digital Marketing Strategy*, **MCDONALD'S**

CS RG S, A&P EX, CX & UX

FINANCE, PROCUREMENT,
GBS & SHARED SERVICESPANEL DISCUSSION:
ENABLING THE ENTERPRISE
TO ACHIEVE THEIR DIGITAL
TRANSFORMATION &
PROCESS IMPROVEMENT
OBJECTIVES

IA can certainly deliver enhanced business value across the enterprise. However, with so many types of IA technologies and use cases, interaction with said technologies can vary greatly – which of course is one of the many areas a CoE (and GBS & SSO) can be highly instrumental in ensuring IA success on an enterprise as well as siloed level.

In this session, topics of discussion will include, yet will not be limited to:

- Creating clear lines of IA and Citizen Development ownership
- Methods to break down silos and consolidate the use of IA technologies, Citizen Development programs, and processes improvement initiatives across the enterprise
- Developing successful and scalable enablement and governance strategies
- Building strong support frameworks to provide new and upgraded IA program training and assistance

Lee Patsel, *Senior Manager, GBS Service Management & Governance*, **ADM**

Henry Lyles, *Director, Global Technology Solutions & Intelligent Automation CoE*, **MCDONALD'S**

Dhruval Shah, *Head of Robotics CoE – New Technology Development & Innovation*, **AT&T**

Shannon Geegan-Katcher, *PMP, GISP, Vice President, Digital Innovation*, **GTI ENERGY**

Bhadra Parmar, *Global Procurement Leader, Global Supplier Management*, **MERCK & CO., INC.**

CS RG S, A&P EX, CX & UX

WORKFORCE CULTURE, HR &
TALENT MANAGEMENTPANEL DISCUSSION:
STRATEGIES TO ADDRESS THE
OVERWHELMING IA LABOR
SHORTAGE PROBLEMS

It's never been easy to recruit and retain top IA talent. However, within the past few years, the challenges have grown dramatically. That said, executives in the position of hiring and developing IA talent have been very busy developing new and innovative IA workforce recruitment and retention strategies. Furthermore, when organizations actively address the universal IA talent shortage problem head on and with creative solutions, they increase their odds of overcoming the current IA labor shortage problem - as well as put themselves in a better position to deal with potential IA labor problems that may arise in the future.

In this session, topics of discussion will include, yet will not be limited to:

- Looking within your organization to find IA and NON-tech talent that can be trained, and/or upskilled to meet your IA project needs
- Bridging the IA workforce gap by implementing Citizen Development initiatives
- Innovative workforce recruitment and retention initiatives as a short and long-term business strategy

David Friedman, *Head of Intelligent Automation CoE*, **RYDER SYSTEMS**

Tamra Butler, *Senior Manager, Robotic Process Automation*, **SOUTHWEST AIRLINES**

AJ Hanna, *Senior Vice President-Transformation & Automation*, **CORONIS HEALTH**

Moderator: **Andra Milender**, *Chief Mission Officer - Community Impact Programs & Former Chief Technology Officer*, **WOMEN IN TECHNOLOGY (WIT) & EQUIFAX**

Hosted by: **WOMEN IN TECHNOLOGY (WIT)**

S, A&P EX, CX & UX

1:45pm

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PRICING &
REGISTRATION**OPERATIONS & PROCESS
IMPROVEMENT**
(located within Innovation Hub)**PANEL DISCUSSION: IPA
(INTELLIGENT PROCESS
AUTOMATION) TO DRIVE COST
SAVINGS, EFFICIENCIES &
ACCURACY INTO PROCESSES
ACROSS THE ENTERPRISE**

Intelligent Process Automation (IPA) merges AI and computer vision, cognitive automation, and machine learning into RPA – which in turn can optimize a wide range of business processes across the enterprise. IPA has the ability to provide impactful data to internal customers while improving their end-to-end process management practices.

In this session, topics of discussion will include, yet will not be limited to:

- Industries, functional areas, and business processes IPA is best suited for and can offer the greatest business outcomes and ROI
- Developing IPA roadmaps that successfully identify automation enhancement opportunities
- Working with your CoE to govern IPA initiatives

Tom Dixon, Senior Vice President, Consumer Continuous Improvement, Process Automation & AI, **CITIZENS BANK**

Emmanuel Lai, Vice President, Intelligent Automation Program Leader, **WELLS FARGO**

Tamra Butler, Senior Manager, Robotic Process Automation, **SOUTHWEST AIRLINES**

Moderator: **Anand Parankussam**, Director of RPA CoE, **ADIANT**

CS S, A&P

**CUSTOMER EXPERIENCE, CALL
CENTERS, MARKETING & SALES**
(located within Innovation Hub)**USE CASE: OPTUM'S USE OF
IA TO DELIVERY PATIENT &
OPERATIONAL EFFECIENCIES**

Prior Authorization review for medical services and equipment is expensive and time-consuming. The clinical assessment requires highly skilled professionals to understand the latest medical policy documents, examine detailed patient health records, gather evidence, and decide promptly. Learn how Optum utilizes IA technologies to provide a decision support system for clinicians and deliver operational efficiencies, cost savings, improved quality, and more.

Topics of discussion will include, yet will not be limited to:

- Matching patient and operational demand with IA solutions
- Determining which processes and use case are best suited for IA
- Best practices and lessons learned

Ravi Narasimhan, Vice President, Information Technology, **UNITED HEALTH GROUP – OPTUM**

Matthew Matousek, Vice President - Digital Transformation, **OPTUM**

Hari Busarapu, Senior Director - Digital Transformation, **OPTUM ADVISORY SERVICES**

RG S, A&P EX, CX & UX

**FINANCE, PROCUREMENT,
GBS & SHARED SERVICES****USE CASE: MASTERCARD'S
ROBUST BOT PRODUCTION &
LIFE CYCLE INITIATIVES**

At Mastercard, their GBSC Automation program is an integral component of their GBSC. Established in 2016, the program has steadily grown to a team of eight full-time employees involved in supporting the full development life cycle of GBSC automations. From requirements gathering to customer acceptance testing, the GBSC Automation team leads each automation project from inception to completion. Once a bot is approved and launched into production, their team continues to monitor, manage, and maintain it until the business process is either changed or retired.

In this Use Case, topics of discussion will include, yet will not be limited to:

- How Mastercard's GBSC team ushered in RPA and continues to lead its expansion through technology, integrations, and evangelism
- Their guidance and oversight initiatives
- How they successfully deployed over 150 automations, life-to-date, which currently performs 180,000 hours of work annually

Jordane Barochez, Vice President Operations, Finance, Analytics & Automation, **MASTERCARD**

Jason Iffrig, Director Software Engineering, **MASTERCARD**

CS RG S, A&P EX, CX & UX

**WORKFORCE CULTURE, HR &
TALENT MANAGEMENT****ROUNDTABLE DISCUSSION:
DEVELOPING IMPACTFUL
GENERATIVE AI CHANGE
MANAGEMENT INITIATIVES**

Considering the fear some have with respect to generative AI taking away their jobs, before your organization moves forward with doing so, its absolutely imperative to develop highly robust change management initiatives - so to reduce adoption and usage hesitation, and or... fear in utilizing said technologies.

Topics of discussion will include, yet will not be limited to:

- Working with a variety of cross-functional teams, perhaps even HR, to develop generative AI adoption messaging and communication campaigns
- Developing effective training and upskilling programs to increase adoption, ux, and usage
- Effectively managing workforce roadblocks that may arise and how to address said challenges

Benjamin Coblentz, Data and Technology Manager, **AMERICAN FAMILY INSURANCE**

CS RG S, A&P EX, CX & UX

2:20pm

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PRICING &
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IMPROVEMENT
(located within Innovation Hub)PANEL DISCUSSION:
EFFECTIVELY SWITCHING OR
UPGRADING LEGACY RPA
PLATFORMS TO OPTIMIZE
IA STRATEGIES DURING &
BEYOND THE RECESSION

Is your enterprise or silos within your organization stuck in a legacy RPA platform with no easy way out? As the IA vendor landscape and practitioner use cases have evolved over the years, RPA tools that may have been ideal in the past may no longer meet your evolving internal and external customers' business needs. However, switching and sometimes upgrading versions of RPA tools can be quite challenging. Nevertheless, if legacy RPA migration or transition is necessary for your organization, rest assure, as it's indeed possible to switch legacy RPA platforms.

Topics of discussion will include, yet will not be limited to:

- Determining if switching or upgrading your legacy RPA platform(s) are worth the time, money, and effort
- Using statistical dashboards to see how much automation has already been mapped to your destination RPA platform and doesn't require manual intervention
- Developing a "Digital Twin" of your processes stuck in legacy RPA – so to ensure data is still readily available for governance, change management, and decision-making purposes

Camille Ready, Senior Director, Corporate Data Delivery & Enterprise Intelligent Automation CoE, **GEORGIA-PACIFIC**

Maxim Loffe, Global Intelligent Automation Leader, **WESCO DISTRIBUTION**

Ram Tyagi, Vice President & Head of Investment Operations Technology, **HARRIS ASSOCIATES**

CS RG S, A&P

CUSTOMER EXPERIENCE, CALL
CENTERS, MARKETING & SALES
(located within Innovation Hub)FIRESIDE CHAT: PROCEED
WITH CAUTION WHEN ASKED
TO "TAKE THE HUMAN" OUT OF
CALL CENTERS

IA technologies can certainly offer a wide array of use case applications and improved business outcomes within call centers, such as increased efficiency, productivity, transparency, and improved CX. However, just because you can automate something in a call center, it doesn't mean you should. That said, when working with your call center customers, it's imperative they understand the delicate balance they must adhere to when requesting parts of their call center to be automated by RPA, AI, ML, etc. Too much, or not the right kind of automation can negatively affect a call center's CX.

In this session, topics of discussion will include, yet will not be limited to:

- Establishing highly collaborative partnerships with your call center customers, so to ensure the IA technologies brought into their operations are in line with their business objectives
- Determining which IA technologies are best suited for your call center customers and would provide them with the greatest business outcomes
- Developing realistic and CX centric digital transformation roadmaps for your call center customers

Emmanuel Lai, Vice President - Intelligent Automation Program Leader, **WELLS FARGO**

Daniel Ireland, Senior Manager, Automation & Business Strategy, **DISCOVER FINANCIAL SERVICES**

RG S, A&P EX, CX & UX

FINANCE, PROCUREMENT,
GBS & SHARED SERVICESFIRESIDE CHAT: IDP
(INTELLIGENT DOCUMENT
PROCESSING) TO IGNITE
PROCESS EXCELLENCE INTO
FINANCE

Surprisingly, in today's digital age, businesses are generating more documents than ever before. Within the finance function, the amount of data being created from invoices, POs, emails, and spreadsheets is overwhelming. That's where IDP (intelligent document processing) comes in to provide finance process improvement. IDP extracts important information from documents and puts it into searchable databases, making it easy for finance teams to find what they need quickly and efficiently. Furthermore, IDP uses AI to help finance quickly and accurately understand and act on data.

In this session, topics of discussion will include, yet will not be limited to:

- Leveraging IDP to drive cost reduction, process efficiency, and improve customer experience
- Utilizing IDP in complex finance processes such as AP, AR, S2P & P2P
- Converting unstructured and semi-structured data with IDP – which in turn can be converted into structured, usable information, providing end-to-end automation to document-centric financial processes

Ramana Rao, Director, GBS Digital, **NEWELL BRANDS**

Ryan Davis, Senior Vice President - Procurement Strategy & Innovation Executive, **BANK OF AMERICA**

Andrew Lamadline, Senior Director & Digital Workforce Product Owner, **KOCH INDUSTRIES**

CS RG S, A&P

WORKFORCE CULTURE, HR &
TALENT MANAGEMENTUSE CASE: UNUM'S
UTILIZATION OF WORKFORCE
ANALYTICS TO ENHANCE ITS
REMOTE WORKFORCES' EX &
BUSINESS OUTCOMES

Like many organizations, Unum has a vast majority of its workforce working remote, and/or hybrid work models – and will most likely keep this work model for quite some time. That said, they decided to deploy a variety of workforce data analysis tools so to recognize, quantify, and improve their workforce's EX and business performance. To date, the programs have been highly valuable to them on many levels.

In this Use Case, you will learn more about:

- Uncovering challenges and opportunities to improve employee engagement, reduce turnover and increase productivity
- Which tools, metrics and benchmarks should be utilized to evaluate and measure success
- Identifying skills gaps to better target employee development and candidate opportunities

Curt Burghardt, Vice President People Delivery, **UNUM**

CS S, A&P EX, CX & UX

2:55pm

MAIN CONFERENCE: DAY ONE

TUESDAY, JUNE 20, 2023

INFO

ADVISORY BOARD
& SPEAKERS

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EXPERIENCES &
ENGAGEMENT

VENUE

SPONSORS

PRICING &
REGISTRATION

3:25pm

"REBOOT" NETWORKING BREAK AND IA "TWO TRUTHS & ONE LIE" GAME

Reboot by enjoying some light snacks and beverages while meeting up with your peers – and join your peers for a fun and engaging icebreaker game taking place within the IA Innovation Hub.

3:55pm

CLIENT USE CASE: PROVIDING BUSINESS VALUE TO YOUR CUSTOMERS BY BEING THEIR IA "TRUSTED ADVISOR"

Creating business value for your customers especially throughout the Recession, means providing them with IA technologies that either solve a problem or creates enhanced opportunities. Furthermore, when it comes to innovation, it's easy to get excited about incorporating IA technologies into your customers' processes. However, to ensure optimized IA service delivery and CX, taking a stance of being their "trusted advisor" is undoubtedly the best route to go.

In this session, topics of discussion will include, yet will not be limited to:

- Establishing highly collaborative partnership dynamics with your customers
- Developing realistic project timelines and job order quotes
- Ensuring optimized service delivery practices

Henry Lyles, *Director, Global Technology Solutions & Intelligent Automation CoE*, **MCDONALDS**

Hosted by: **AUTOMATION ANYWHERE**

RG S, A&P EX, CX & UX

4:25pm

PANEL DISCUSSION: UNLEASHING HYPERAUTOMATION TO OPTIMIZE IA SOLUTIONS ACROSS THE ENTERPRISE THROUGHOUT & BEYOND THE RECESSION

Hyperautomation can quickly identify, vet, and automates a wide array of business and IT processes across the enterprise. Simply put, hyperautomation's core purpose is to identify the right processes to automate, then apply the right mix of IA technologies to develop optimized intelligent automation solutions on a broad scale. That said, it's capable of offering significant process improvement and business outcomes across the enterprise.

In this session, topics of discussion will include, yet will not be limited to:

- What needs to be considered and analyzed prior to embarking on a hyperautomation journey
- How hyperautomation can leverage best-in-class components to create lightweight, enterprise-strength applications, minimizing development time and maximizing application capabilities
- Steps to develop a successful hyperautomation roadmap

Cristina Duta, *Director, Intelligent Automation - GBS*, **AECOM**

Rahul Trivedi, *Vice President of Intelligent Automation*, **TRANSUNION**

Emily Fry, *Vice President, Innovation Operations*, **GEISINGER**

Moderator: **Lee Coulter**, *Godfather of IA & Chief Digital Officer*, **ACRESIS**

CS RG S, A&P EX, CX & UX

5:15pm

CHAIRMAN'S CLOSING REMARKS

Chairman, **Ryan Davis**, *Senior Vice President - Procurement Strategy & Innovation Executive*, **BANK OF AMERICA**

5:20pm

WELCOME RECEPTION

Join your peers in the IA Innovation Hub to continue your IA conversations, make the last call for the IA "Best in Class" Award nominations, and to meet with some of the leading IA solution providers within the IA vendor landscape.

MAIN CONFERENCE: DAY TWO

WEDNESDAY, JUNE 21, 2023

7:30am

NETWORKING BREAKFAST

Join your IA peers for lively conversations over breakfast.

8:30am

CHAIRMAN'S OPENING REMARKS & NETWORKING ICEBREAKERChairman, **Ryan Davis**, Senior Vice President - Procurement Strategy & Innovation Executive, **BANK OF AMERICA**

8:45am

PANEL DISCUSSION: ESTABLISHING IA VALUE WITH YOUR CLIENTS IS AN ONGOING NECESSITY TO ENSURE CX EXCELLENCE

Although IA technologies have been around for quite some time and have proven to be highly valuable to solving a wide array of business problems, and/or....creating new business opportunities, IA adoption and acceptance is still a common obstacle IA teams face with their customers and internal stakeholders on a regular basis. That said, to ensure successful IA project roll out and adoption, getting ahead of the many challenges associated with such is imperative.

In this sessions, topics of discussion will include, yet will not be limited to:

- Methods to successfully get new lines of business interested in your highly valuable IA services - word of mouth, proof in the pudding, etc.
- Best practices to establish your IA initiatives and teams as "trusted partners" vs. a threat to various functional teams, most notably IT
- Building dynamic stakeholder involvement, communication, and teamwork - who, how, and WHY it's imperative?

Shelly Blakeman, Principal, Change Management, **DELTA DENTALS**

Kelly McNeil, Senior Strategic Program Director, **TRAVELNET SOLUTIONS**

David Friedman, Head of Intelligent Automation CoE, **RYDER SYSTEM**

Sam Aborne, Managing Director, CoE, FM Operations @ Google for CBRE, **CBRE**

CS RG S, A&P EX, CX & UX

9:15am

USE CASE PANEL DISCUSSION: CHATGPT & MANAGED SERVICES ENABLING IA & SCALED RPA PROGRAMS

There are many intelligent automation technologies, outside of traditional RPA that enterprises have struggled to leverage due to traditional software models. As with every software, as challengers have emerged, combined with legacy RPA vendors maturing, consumption and "As A Service" models have now enabled better access to the more "intelligent" parts of the platform than ever before.

In this use case, topics of discussion will include, yet will not be limited to:

- Review of the impact IA offerings are having as well as the looming integration with ChatGPT
- Traditional RPA "As A Service"
- Leveraging Process and Desktop Mining Technologies
- ChatGPT and IDP – a match made in heaven or a security nightmare
- Consumption Models at Scale

Armando Lambert, Vice President, Enterprise Optimization, **BAYVIEW ASSET MANAGEMENT**

Joshua Reicher, Chief Digital Officer, **CENLAR**

Zia Bhutta, Chief Executive Officer & Partner, **ANAI CAPITAL MANAGEMENT**

Moderator: **Ahmed Zaidi**, Chief Executive Officer, **ACCELIRATE**

Hosted by: **ACCELIRATE**

CS RG S, A&P EX, CX & UX

MAIN CONFERENCE: DAY TWO

WEDNESDAY, JUNE 21, 2023

FIRESIDE CHAT USE CASE: LIBERTY LATIN AMERICA'S IA JOURNEY

In this session, Asad from Liberty Latin America, will discuss his journey and lessons learned as an RPA leader at CenturyLink and now at Liberty Latin America (LLA), where he is responsible for architecture, integration, and automation. Asad will highlight his adoption of Python/cloud-native intelligent automation and how his team has quickly delivered operational stability and ROI, and how the telecom built an end-to-end solution using containerized bot operations in a cloud environment.

Asad Nabi, Chief Enterprise Architect & Head of Architecture, Integration & Automation, **LIBERTY LATIN AMERICA**

Antti Karjalainen, Chief Executive Officer, **ROBOCORP**

Hosted by: **ROBOCORP**

CS RG S, A&P EX, CX & UX

"REBOOT" NETWORKING BREAK

Reboot by enjoying some light snacks and beverages while meeting up with your peers – and be sure to also visit the IA solution providers located within the IA Innovation Hub!

"The RPA conference provided real-world experiences that increased the knowledge (and comfort level) for the attendees to return back to their organizations and influence the adoption of RPA & SPA."

ELI LILLY AND COMPANY

MAIN CONFERENCE: DAY TWO

WEDNESDAY, JUNE 21, 2023

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PRICING &
REGISTRATIONOPERATIONS & PROCESS
IMPROVEMENT
(located within Innovation Hub)**BPM (BUSINESS PROCESS
MANAGEMENT) TO OPTIMIZE
WORKFLOW AUTOMATION
& BOOST PROCESSES
EXCELLENCE**

Business Process Management (BPM) is a people-driven discipline that creates and manages processes that continually improve business results. It focuses on improving entire processes rather than individual tasks, which helps strengthen performance, KPIs, and business outcomes. It can address challenges associated with functional areas with complex operations, massive amounts of data, and increased demand to "do more with less", and often in less time.

In this session, topics of discussion will include, yet will not be limited to:

- Understand how BPM enables digital transformation and how to get started with BPM
- How BPM is not just a software tool, but instead is a discipline for discovering, designing, executing, measuring, and optimizing an organization's processes
- Functional areas and processes BPM could offer enhanced business outcomes
- BPM use cases – and the how, why, and results achieved

Glen Stambone, *Lean Six Sigma Black Belt & Director, Project Management Office, BOEHRINGER INGELHEIM*

CS RG S, A&P

CUSTOMER EXPERIENCE, CALL
CENTERS, MARKETING & SALES
(located within Innovation Hub)**PANEL DISCUSSION: IA TO
DRIVE IMPACTFUL OMNI-
CHANNEL CX STRATEGY
& INCREASE ENTERPRISE
REVENUE**

In today's highly competitive marketplace, brands, retailers, and manufacturers must have robust omni-channel strategies in place. IA technologies enables brands, retailers, and manufacturers to better define customer personas, their buying preferences, and journeys. Additionally, it enables omni-channel strategies to scale by providing insights into the changing needs and preferences of customers. It increases speed, efficiency, and accuracy within CX operations and other areas of the business due to advanced data and predictive analytics systems, which in turn can provide highly valuable BI across the enterprise.

In this session, topics of discussion will include, yet will not be limited to:

- IA to improve inventory management, supply chain, distribution logistics, price optimization, invoicing, and more
- Enhanced CX using chat bots, Point-of-Purchase automated check outs and customer profiling, virtual try-on, and much more
- AI & ML-driven omni-channel marketing

RG S, A&P EX, CX & UX

FINANCE, PROCUREMENT,
GBS & SHARED SERVICES**USE CASE: PROCTER & GAMBLE
- RE-INVENTING CUSTOMER
SERVICE - AUTOMATION, BPM
& ANALYTICS, ENABLING
A SELF-DRIVEN & CENTRIC
ORGANIZATION**

Over 250 automations are handling repetitive tasks in order-to-cash alone - and data is everywhere from shelf to manufacturing lines. In this Use Case session, Procter & Gamble will share how they leveraged BPM & CRM platforms to bring together task automation and prioritization, work orchestration and key targeted shelf data insights to streamline the daily order processing cycle and deliver next S-curve of service level improvements, productivity and superior user experience.

In this Use Case session, topics of discussion will include, yet will not be limited to:

- Breaking the silos - customer replenishment analyst organizational design and work process transformation
- CRM and automation technologies coming together to cover a full 360 degrees customer view
- Product & platform-oriented architecture using a DevOps organizational model and SAFe & Agile approach

George Leu, *Global Order Management Smart Automation & Strategic Programs Senior Director – GBS, PROCTOR & GAMBLE*

CS RG S, A&P EX, CX & UX

WORKFORCE CULTURE, HR &
TALENT MANAGEMENT**FIRESIDE CHAT:
DEVELOPING HR &
EMPLOYEE EXPERIENCE
IA SOLUTIONS WITH HIGH
ADOPTION & USAGE RATES**

When proposing and developing IA solutions for your HR and employee experience customers, it's imperative the IA technologies are business solution centric, as well as EX and UX friendly. When IA solutions are under-utilized, the cost per unit value are greatly reduced. Additionally, like all IA programs, they must include robust data reporting tools that provide easy to understand business insights for stakeholders, so to ensure program sustainability and continued funding.

Topics of discussion will include, yet will not be limited to:

- Working with your HR and EX internal partners to develop training and upskilling programs to increase EX and UX adoption
- HR & EX data reporting dashboards that provide valuable business insights
- Developing and managing robust change management initiatives

Patty Boland, *Vice President & Senior Architect, Intelligent Process Automation, CITIZENS*

Curt Burghardt, *Vice President People Delivery, UNUM*

CS S, A&P EX, CX & UX

11:00am

MAIN CONFERENCE: DAY TWO

WEDNESDAY, JUNE 21, 2023

OPERATIONS & PROCESS IMPROVEMENT

(located within Innovation Hub)

USE CASE: VOYA FINANCIAL'S METHODS TO BUILD ON A FOUNDATION OF CONTINUOUS IMPROVEMENT & PROCESS OPTIMIZATION

Innovation is becoming to how organizations are operating. Innovation is more than just finding ways to get a list of ideas or something that is done only by a small group. It now requires organizations to develop capabilities and provide mechanisms to include everyone. Leveraging continuous improvement, lean and agile methodologies, you can create a holistic system for innovation.

Learn how Voya Financial leaders and colleagues are flexing their innovation muscles.

- Different types of innovation, the big ideas and everyday problem solving
- Leveraging experimentation to bridge the gap between ideas and implementation
- Applies Building a fail fast mindset
- How Delivering in an iterative methodology to stay agile
- How Delivering in an iterative methodology to stay agile

Jeff Machols, Senior Vice President,
Continuous Improvement, **VOYA FINANCIAL**

CS S, A&P EX, CX & UX

CUSTOMER EXPERIENCE, CALL CENTERS, MARKETING & SALES

(located within Innovation Hub)

FIRESIDE CHAT: MAXIMIZING CX FOR REVENUE GROWTH: BEYOND CHATBOTS AND INTO OMNICHANNEL PROACTIVITY

Over the past few years, IA technologies have been touching B2C customers at heightened levels – and have been utilized for a wide array of CX business insight purposes and much more. The importance of customer experience (CX) cannot be overstated in today's competitive landscape. Simply focusing on CX is no longer enough - it's time to turn it into a revenue-generating effort.

In this bold conversation, we will explore:

- What is CX automation today?
- What metrics should be used to measure it
- How to unshackle the chatbot only dependence as the first reach
- Holistic CX and automation opportunities within it
- Omnichannel impact, a proactive vs reactive approach

Christina Duta, Director, Intelligent Automation
- GBS, **AECOM**

Moderator: **Shail Khiyara**, President, **VOCAL**

RG S, A&P EX, CX & UX

FINANCE, PROCUREMENT, GBS & SHARED SERVICES

USE CASE: VMWARE'S JOURNEY OF IA ADOPTION ACROSS THE ENTERPRISE

Six years ago, VMware established a CoE as an early adopter of intelligent automation in the Finance space. Fast forward to the present, this CoE enables and drives business and digital transformation enterprise-wide through a sustainable and scalable intelligent automation program. In this session, we will discuss VMware's journey of IA adoption enterprise-wide, success stories and challenges on the way, lessons learned, and best practices adopted.

In this session, topics of discussion will include, yet will not be limited to:

- IA technologies to improve vendor management, dynamic discounting, general ledger, free cash, procure-to-pay, and much more
- Procurement workflow dashboards with robust data visualization and BI built into them
- Optimizing procurement processes utilizing IDP
- Assessing procurement workflows – integration, adoption, usage, and performance metrics/KPIs

Neeraj Mathur, Director, Intelligent Automation, **VMWARE**

Julio Viquez, Senior Manager, Intelligent Automation, **VMWARE**

CS RG S, A&P

WORKFORCE CULTURE, HR & TALENT MANAGEMENT

ROUNDTABLE DISCUSSION: DEVELOPING & MANAGING IMPACTFUL IA & GENERATIVE AI SOLUTIONS ADOPTION & UX

When developing and rolling out IA and generative AI solutions, it's imperative the technologies and their use cases are business solution centric, as well as EX and UX friendly – and with generative AI, are positioned in a manner that will reduce hesitation, and/or...fear in utilizing said technologies. When IA and generative AI solutions are under-utilized, the cost per unit value are greatly reduced. Additionally, to ensure maximum usage, adoption, and ROI, they must include robust data reporting tools that provide easy to understand business insights for stakeholders, so to ensure program sustainability and continued funding.

Topics of discussion will include, yet will not be limited to:

- Working with a variety of cross-functional teams to develop effective training and upskilling programs to increase adoption and usage
- Data reporting dashboards that provide valuable business insights
- Developing and managing robust change management initiatives – most especially with generative AI program roll outs

Matthew Kelly, Senior Vice President,
Digital & Automation, **NORTHERN TRUST
ASSET MANAGEMENT**

CS S, A&P EX, CX & UX

11:35am

MAIN CONFERENCE: DAY TWO

WEDNESDAY, JUNE 21, 2023

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PRICING &
REGISTRATIONOPERATIONS & PROCESS
IMPROVEMENT
(located within Innovation Hub)PANEL DISCUSSION:
IMPLICATIONS & REWARDS
OF CITIZEN DEVELOPMENT
PROGRAMS

In recent years, the combination of amplified IA labor shortages and advancements in low code/no code technologies have resulted in Citizen Development programs sprouting up within organizations, most notably within various functional silos. In turn, there has been a lot of debate, discussion, and serious business analysis surrounding the topic of Citizen Development programs.

Topics of discussion will include, yet will not be limited to:

- Identifying and upskilling workforces to be Citizen Developers
- Determining which processes should or should NOT be touched by Citizen Developer programs
- Governance and CoE involvement
- Winning IT buy-in, and/or...acceptance of Citizen Developer programs

Matt Murphree, Assistant Vice President, Employee Technology & Enablement, **GM FINANCIAL**

Christina Custis-Thomas, Director, Cross Functional Operations Team & Administrative Services, Allstate Benefits, **ALLSTATE**

Andrew Enderle, Senior Process Automation & Technology Analyst, **AMERICAN FAMILY INSURANCE**

Jack Deem, Assistant Controller, **CON EDISON**

Moderator: **Camille Ready**, Senior Director, Corporate Data Delivery & Enterprise Intelligent Automation CoE, **GEORGIA-PACIFIC**

CS RG S, A&P EX, CX & UX

CUSTOMER EXPERIENCE, CALL
CENTERS, MARKETING & SALES
(located within Innovation Hub)PANEL DISCUSSION:
REDUCING THE FRICTION IN
HOSPITAL SYSTEMS TO MEET
REVENUE, WORKFORCE, AND
PATIENT DEMANDS IN THE
POST-COVID WORLD

Hospital systems are coming out of the post-COVID world with less staff, finances, and technology to support operations and the patient CX. Hospitals are starting to embark on their IA journeys by utilizing various technologies to reduce the friction that traditional systems have created, mainly in non-clinical areas initially, but now embarking on the clinical workflows to address margin and workforce challenges.

These systems are organizing to scale and sustain results, creating a better experience for their employees and patients using IA technologies, such as RPA, AI, and ML, in all aspects of their operations - both patient facing and back office.

In this session, topics of discussion will include, yet will not be limited to:

- How providers are organizing around Center of Excellence development, organizational strategies and return on investment
- Using IA technologies to remove friction throughout the hospital system
- ROI and wins and lessons learned

Swarna Kuruganti, Digital Innovation - Operations Transformation, **MOFFIT CANCER CENTER**

Tim Bracken, Director of Automation - Innovation Institute, **GEISINGERS**

Stephen Nielson, MHA, Manager of Digital Health, **MERCYONE**

Moderator: **Sherry Smith**, Vice President, Center for Operational Transformation, **AVIA HEALTH**

CS S, A&P EX, CX & UX

FINANCE, PROCUREMENT,
GBS & SHARED SERVICESFIRESIDE CHAT: DRIVING
ADDITIONAL IA INTO FINANCE
TO ADDRESS THE UPTICK IN
FINANCE PROCESSING CAUSED
BY THE RECESSION & TO
CONTINUE AN ORGANIZATION
RECESSION PLANNING

Unfortunately, due to the Recession, Finance has been bombarded with an increase in internal and external financial processing - as it relates to B2B and B2C refinancing, reforecasting, re-budgeting, and much more. Furthermore, as the world's economies are still very fragile, we're still not out of the Recession planning weeds - which has caused a workload surge to Finance operations. That said, as internal and external customers continue to lean on Finance to help them deal with their recent financial hardships, and/or prevent further financial problems, introducing additional IA solutions into Finance is one of many ways to weather the storm.

Topics of discussion will include, yet will not be limited to:

- Areas of Finance operations that could benefit from additional IA solutions, so to better serve their internal and external customers with the financial support they require during these very challenging times
- Workflow dashboards with robust data visualization and BI built into them - and how to best data pull, digest, merge, and analyze the data
- Enhanced IA financial reporting tools to provide heightened financial reporting within Finance as well as to their customers

Angela McKeirnan, Director, Global Procurement Center for Excellence, **DENTSPLY SIRONA**

Ramana Rao, Director - GBS Intelligent Automation, **NEWELL BRANDS**

CS RG S, A&P EX, CX & UX

WORKFORCE CULTURE, HR &
TALENT MANAGEMENTPROVIDING EMPLOYEES WITH
24/7 & 365 HR SERVICES WITH
CONVERSATIONAL AI

Over the past few years, as many workforces are working remote or hybrid work models, providing off premise (as well as on premise) workforces with quick and accurate answers to their HR related questions and concerns have been a standard business necessity. In turn, conversational AI bots have been introduced to most HR operations. By reducing mundane and repetitive processes from HR workflows, by utilizing conversation AI, HR teams have been able to "do more with less" and with much higher rates of efficiency, accuracy, and speed.

In this session, topics of discussion will include, yet will not be limited to:

- "Taking the robot out of the human" - how much is too much?
- Challenges and solutions associated with HR conversational AI integration and APIs/IoT
- Assessing HR conversational AI - adoption, usage, and performance metrics/KPIs

Patty Boland, Vice President & Senior Architect, Intelligent Process Automation, **CITIZENS**

CS S, A&P EX, CX & UX

12:05pm

MAIN CONFERENCE: DAY TWO

WEDNESDAY, JUNE 21, 2023

12:35pm

NETWORKING LUNCHEON

Join your IA peers for lively conversations over lunch.

BUILDING THE BUSINESS CASE ROUNDTABLES - pre-registration required

As many of you already know, the primary goal of creating a business case is to convince decision-makers to go forward with a particular idea, project, or task, so to either solve a business problem or seize an opportunity. It also helps organizations prioritize projects across the enterprise. That said, in the intelligent automation and process improvement space, whereas obtaining IA buy-in and measuring ROI is a common challenge many of you face, being able to get together with your peers to discuss and work through a variety of business problems and opportunities, in the framework of a business case, will certainly come in very handy as you work with your IA customers, and/or....develop new IA initiatives and strategies. In these highly collaborative roundtable discussions, the speakers and attendees will discuss and work through a particular IA use case, structured in the below manner.

- Business problem or opportunity – overview and background information, project definition, business requirements, alternative options & evaluation, and strategic alignment
- Benefits, risks, costs, and technical requirements & solutions
- Project implementation plan and timeline
- Impact on operations
- Organizational capability to deliver the project outcomes, financial analysis, and final summary

ROUNDTABLE #1A: IA TO STREAMLINE & OPTIMIZE THE PROCUREMENT PROCESS AND PROVIDE ADDITIONAL BUSINESS VALUE

Bhadra Parmar, *Global Procurement Leader, MERCK & CO., INC.*

CS RG S, A&P EX, CX & UX

ROUNDTABLE #2A - ENSURING YOUR IA PROGRAM(S) ARE A VALUE ADD TO YOUR ORGANIZATION

Maxim Ioffe, *Global Intelligent Automation Leader, WESCO DISTRIBUTION*

CS S, A&P

ROUNDTABLE #3A: REDUCING CALL CENTER'S REQUEST FOR "AGENT" FREQUENCY

RG S, A&P EX, CX & UX

ROUNDTABLE #4A: REDUCING CLAIM HANDLING TURNAROUND TIMELINE & ENHANCING CX

CS RG S, A&P EX, CX & UX

ROUNDTABLE #1B: UTILIZING GENERATIVE AI TO ENHANCE OPERATIONS & PROCESS IMPROVEMENT

Thomas Dixon, *Senior Vice President, Consumer Continuous Improvement, Process Automation & AI, CITIZEN BANK*

CS RG S, A&P EX, CX & UX

ROUNDTABLE #2B: REDUCING FINANCIAL RECONSOLIDATION TURNAROUND TIME

CS S, A&P

ROUNDTABLE #3B: DELIVERING IMPACTFUL HR ONBOARDING

S, A&P EX, CX & UX

ROUNDTABLE #4B: EXTRACTING IMPACTFUL DATA

Yyoti Nigam, *Chief Operational Practice Excellence, NORTHERN TRUST*

CS RG S, A&P EX, CX & UX

1:35pm

2:35pm

MAIN CONFERENCE: DAY TWO

WEDNESDAY, JUNE 21, 2023

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REGISTRATION

3:25pm

"REBOOT" NETWORKING BREAK AND IA TRIVIA CHALLENGE

Reboot by enjoying some light snacks and beverages while meeting up with your peers – and join your peers for a fun and engaging icebreaker game.

3:45pm

PANEL DISCUSSION: EMBEDDING IA INTO IA SYSTEMS SHUT DOWN STRATEGIES TO ENSURE PROCESS EXCELLENCE & BUSINESS CONTINUITY

The past few years have certainly taught us to always expect the unexpected. That said, unfortunately, no matter how many safeguards are put in place to prevent IA, and/or IT system shutdowns, it's never enough - which is why it's imperative to create multi-layering IA and IT recovery and business continuity strategies. To this point, IA, IT, and operation teams must align their business goals and disaster recovery plans, so to ensure the systems, data, processes, and other digital assets they leverage between their functional areas are always prepared for worse-case scenarios.

In this session, topics of discussion will include, yet will not be limited to:

- Adding IA to IA systems disaster recovering initiatives
- Testing out disaster recovery and business continuity plans
- IA cloud & IoT migration and integration
- "Digital Twins" – of systems, data, processes, and other digital assets

Tony Brooks, *Director of Enterprise Cloud Services*, **UNIVERSITY OF COLORADO**

Sameer Naik, *Enterprise Analytics Manager*, **CONAGRA BRANDS**

Shannon Geegan- Katcher, *PMP, GISP, Vice President, Digital Innovation*, **GTI ENERGY**

S, A&P

EX, CX & UX

4:15pm

IA ACCOUNTABILITY BUDDY HUDDLES

Leverage the connections and insights you have acquired at the Intelligent Automation Week event by getting together with an IA Accountability Buddy! During this final session, you'll be partnered with an IA Accountability Buddy - either someone you'll identify yourself or someone we'll find for you. While together, we hope you'll share your IA key takeaways and discuss action plans you can hold each other accountable for within the coming year. We also hope you'll share your contact information with your IA Accountability Buddy, as well as anyone else that is still around and you haven't already connected with.

CS

S, A&P

EX, CX & UX

4:45pm

CHAIRMAN'S CLOSING REMARKS

Chairman, **Ryan Davis**, *Senior Vice President - Procurement Strategy & Innovation Executive*, **BANK OF AMERICA**

5:00pm

CONFERENCE CONCLUDES – SEE YOU NEXT TIME!

IDG (INTERACTIVE DISCUSSION GROUPS)

Discuss, debate, brainstorm, and problem solve common IA use cases and hurdles amongst your peers. Three rounds of 30-minute IDGs. Select three (3) IDGs to attend.



IDG #1 CREATE SMARTER & FASTER PROCESS HANDLING	IDG #2 CHALLENGES, SOLUTIONS & BREAKTHROUGHS OF UTILIZING GENERATIVE AI WITHIN THE ENTERPRISE	IDG #3 INCREASE INFORMATION PROCESSING TURNAROUND, INTEGRITY & COMPLIANCE
IDG #4 REDUCE OPERATIONAL WASTE & REDUNDANCY	IDG #5 MAX OUT AUTOMATION WITH PROCESS MINING AND INTELLIGENT DOCUMENT PROCESSING	IDG #6 REVAMPING IA VENDOR MANAGEMENT STRATEGIES TO OPTIMIZE IA INVESTMENTS THROUGHOUT THE RECESSION & BEYOND
IDG #7 ACHIEVE ENTERPRISE BUSINESS OBJECTIVES AT REDUCED COSTS	IDG #8 TRANSITION YOUR COE INTO A ENTERPRISE DELIVERY MODEL	<i>JOIN THE CONVERSATION!</i>

BUILD THE BUSINESS CASE ROUNDTABLES

Get together with your peers to discuss and work through a variety of business problems and opportunities, in the framework of a business case, which will certainly come in very handy as you work with your IA customers, and/or....develop new IA initiatives and strategies.



Roundtable #1A

IA TO STREAMLINE &
OPTIMIZE THE
PROCUREMENT PROCESS
AND PROVIDE ADDITIONAL
BUSINESS VALUE

Roundtable #2A

ENSURING YOUR IA
PROGRAM(S) ARE A
VALUE ADD TO YOUR
ORGANIZATION

Roundtable #3A

REDUCING CALL
CENTER'S REQUEST FOR
"AGENT" FREQUENCY

Roundtable #4A

REDUCING CLAIM
HANDLING TURNAROUND
TIMELINE &
ENHANCING CX

Roundtable #1B

UTILIZING GENERATIVE AI
TO ENHANCE OPERATIONS
& PROCESS
IMPROVEMENT

Roundtable #2B

REDUCING FINANCIAL
RECONSOLIDATION
TURNAROUND TIME

Roundtable #3B

DELIVERING IMPACTFUL
HR ONBOARDING

Roundtable #4B

EXTRACTING
IMPACTFUL DATA

JOIN THE CONVERSATION!

THE IA WEEK EXPERIENCE

Welcome
Receptions

IA Innovation Hub

Networking
& Icebreaker
Games!

IA Solution Providers'
Meet & Greets and
Consultations

Networking
Breakfasts &
Luncheons

Night on the Town
Dinner Parties &
Experiences

IA INNOVATION HUB

Join your peers in the event's annex epicenter, otherwise known as...the **IA Innovation Hub!** The IA Innovation Hub will certainly be a very exciting place to visit, may it be to network with your IA peers, learn more about some of the leading solution providers in the IA vendor space, enjoy the various welcome receptions, and/or....to attend the operations & process improvement or customer experience, call centers, sales & marketing sessions! We look forward to seeing you and your **ENTIRE ENTERPRISE** colleagues in the sure to be exciting and highly informative and valuable IA Innovation Hub!

Welcome Receptions, Icebreakers & Networking Breaks,
AND....Pre-Event Meet Up at 7pm on Sunday, June 18!

Exciting Sessions Taking Place in the IA Innovation Hub!

Feel the energy of the IA Innovation Hub while attending the operations & process improvement and customer experience, call centers, and marketing & sales sessions.

IA Solution Providers' Meet & Greet and Consultations

Meet with some of the leading IA solution providers within the IA vendor landscape – to learn how they could possibly meet your current and evolving business needs.

IA TEAM BUILDING PIZZA MAKING EXPERIENCE & DINNER

Join your peers at the [Doughboy Pizza Making Contest & Team Building Experience](#) taking place on [Monday, June 19](#). As everyone arrives to the off-site Experience, everyone will be greeted by Labriola's Chef and their staff. Once seated, the Chef will explain how to make the best pizza. Attendees of this Experience will be broken into teams to create pizzas with any toppings they would like. While pizzas are cooking, you will enjoy famous Labriola bread, appetizers, salad, and cocktails. The Chef will then come out and pronounce the winning pizza.

Pre-registration is required. Register ASAP to secure your spot on this fun and engaging team building exercise and social night out.



IA WEEK EVENT APP



Download the mobile app to create your personalized conference schedule, stay current on any program scheduling changes, learn more about the exhibitors, schedule meetings with industry peers, and to share your experience live.

Stay Connected on the Go:

- Receive agenda updates and track when your favorite speakers are scheduled to present
- Connect with attendees on LinkedIn and Twitter directly through the app, exchange private messages, and manage your connections seamlessly
- Engage with solutions providers and schedule a time for a personalized consult
- Attend with your team to maximize your experience: share notes, plan meetups, and more with just a few swipes

Here's How to Download It:

- Search for "Events Air" in your app store
- Create a profile & sign up
- Complete your profile & hit 'join'
- Click on 'Intelligent Automation' event and join the fun!

** The Intelligent Automation app will be open and LIVE 3-weeks prior to the event. Check in then to receive all the latest event details.*

LET'S GET SOCIAL!

Stay up to date with the Intelligent Automation Week event
and join the event's social media groups!



SEE YOU IN CHICAGO

VENUE

Chicago Marriott Downtown Magnificent Mile

540 N Michigan Avenue, Chicago Illinois 60611

Phone: (312) 836-0100

A Group Discount Rate has been established for all our IA attendees. The rate is \$289.00 per night. To secure this special offer, simply call (312) 836-0100 and give them the group name of "Intelligent Automation Summit". Additional booking information soon to come!

Treat yourself to a world-class destination experience at the Chicago Marriott Downtown Magnificent Mile hotel. This Michigan Avenue hotel features newly renovated rooms with many with breathtaking city, skyline and lake views. The trendy on-site eateries, Harvest Restaurant and Rush Street Pantry, use local ingredients to create delicious, made-from-scratch American cuisine. Stop by futuristic Rush Street Bar and Lounge for cocktails or wine. Let this downtown Chicago hotel be your starting point for adventure, with high-end shopping, Navy Pier, Millennium Park and more just a walk away.

SITES & ATTRACTIONS

MILLENNIUM PARK

With 25 acres of awe-inspiring landscape, breathtaking architecture and an iconic collection of public art, Millennium Park is Chicago's premier green space. "The Bean", Chicago's signature landmark in its mirror-like surface will allow you to see not only your own reflection but the downtown skyline.

SKYDECK CHICAGO

Dare to stand out on the 103rd floor, with never before seen views. The 1,353 feet straight down, with a glass boxes extending 4.3 feet out from the Skydeck, providing never before seen views of Chicago. Enjoy 360 degree views spanning up to 50 miles and 4 states.

NAVY PIER

Navy Pier is a bustling 1.5 mile-long boardwalk filled with restaurants, shops, and plenty of activities to fill your day.

360 CHICAGO

If you're looking for one of the best views of Chicago, a visit to 360 CHICAGO is a must. In fact, Travel + Leisure magazine named it one of the Best Views in America. Located high above The Magnificent Mile, 360 CHICAGO is an observation deck nestled on the 94th floor of the John Hancock Center, the fourth-tallest building in the city recognized for the distinctive X-shaped external bracing that has made it a Chicago architecture icon.

SPONSORS INCLUDE

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SOFTWARE SYSTEMS

RIPCORD

BotCity

JOURNEYTEAM

turbotic

WONDERBOTZ

Robocorp

rby AI

SPONSORSHIP OPPORTUNITIES

Networking

Ensure that you have the opportunity to engage with the key decision makers within your industry. We can create a platform for you to effectively interact with your top customers and prospects in the environment of your choice. This can range from formalized private meetings / workshops right through to less structured networking events such as sponsored drinks receptions, coffee breaks or lunches. Ultimately whatever you decide is the right forum; we will support you in your quest to advance relationships with the key people who can influence the future of your business.

Branding

Your company can be elevated to a position where they are seen as a market leader. In a fiercely competitive market you need to ensure that your brand is differentiated from the competition. Failure to create a clear identity will see your organization fade into the background. We ensure that we do everything we can to effectively lift your brand before, during and after the event. Not only do we create a fully integrated marketing campaign, which your company can be part of, but we also offer high impact premium branding opportunities for example on bags, water bottles, pens lanyards etc.

Thought Leadership

If you think that you should be viewed as a true industry leader then your need to demonstrate your market knowledge and expertise through a thought leadership opportunity, such as speaking or chairing. This is a highly unique opportunity for your company to educate the market, and as long as you are credible enough to fit into a high level event program, we can position your organization alongside top customers and prospects in our speaker faculty. As part of this speaker faculty your company will be set apart from other industry attendees giving you the competitive edge required to make further strides in the market.



To learn more about the available sponsorship opportunities, contact:

Shah Zaman, *Managing Director, Strategic Partnerships, IQPC & SSON*
E: shah.zaman@ssonetwork.com

PRICING & REGISTRATION

PRACTITIONERS

PACKAGE	REGISTER & PAY BY MAY 29	ON-SITE
SILVER – Including: Main Conference + Breakfast & Lunch Networking Opportunities + Networking Receptions	\$2,999 SAVE \$600	\$3,599
GOLD – Including: Main Conference + 3 Workshops + Off-Site Networking Experience + Breakfast & Lunch Networking Opportunities + Networking Receptions	\$3,399 SAVE \$600	\$3,999
PLATINUM – Including: Main Conference + 3 Workshops + Masterclass + Off-Site Networking Experience + Breakfast & Lunch Networking Opportunities + Networking Receptions	\$3,999 SAVE \$600	\$4,599
Master Class		\$649
Workshop		\$549
Expo Hall Only Pass for Students		\$199

VENDORS & SOLUTION PROVIDERS

PACKAGE	ON-SITE
Silver Vendor Pass	\$4,299

TEAM DISCOUNTS [CLICK HERE TO LEARN MORE](#)

PACKAGE	DISCOUNTS
Group 3 to 4	25%
Group 5 to 7	30%
Group 8+	35%

*Discounts apply to registrations submitted together, at the same time. Cannot be combined with any other discount. Valid for both Practitioner and Vendor & Solution Provider market.

BRING YOUR ENTIRE TEAM & ENTERPRISE

Operations & Process Improvement | Customer Experience, Call Centers, Marketing & Sales | Finance, Procurement, GBS & Shared Services | Work Culture, HR & Talent Management | Technology

3 EASY WAYS TO REGISTER



Call
1-800-882-8684



Email
enquiry@iqpc.com



Register Online
IntelligentAutomation.iqpc.com

[LEARN MORE](#)

*IQPC reserves the right to determine who is considered an End-User or a Vendor upon registration for an event. Those who are determined a vendor will be denied access to End-User pricing. These prices are featured as a limited time only promotion. IQPC reserves the right to increase these prices at its discretion.

Please note multiple discounts cannot be combined. A \$99 processing charge will be assessed to all registrations not accompanied by credit card payment at the time of registration.

MAKE CHECKS PAYABLE IN U.S. DOLLARS TO: IQPC

*CT residents or people employed in the state of CT must add 6.35% sales tax.

Team Discounts: For information on team discounts, please contact IQPC Customer Service at 1-800-882-8684. Only one discount may be applied per registrant.

Special Discounts Available:

A limited number of discounts are available for the non-profit sector, government organizations and academia. For more information, please contact customer service at 1-800-882-8684.

Details for making payment via EFT or wire transfer:

Bank Name: JP Morgan Chase & Co.
Name on Account: Penton Learning Systems LLC dba IQPC
Account #: 937-332641
ABA/Routing #: 021000021
Reference: 25220.006

Payment Policy: Payment is due in full at the time of registration and includes lunches and refreshment. Your registration will not be confirmed until payment is received and may be subject to cancellation. For IQPC's Cancellation, Postponement and Substitution Policy, please visit www.ssonetwork.com/events-intelligent-automation-chicago/srspricing

Special Dietary Needs: If you have a dietary restriction, please contact Customer Service at 1-800-882-8684 to discuss your specific needs.

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