

AN EXCLUSIVE AND VIBRANT
COMMUNITY FOR IA, AI,
AUTOMATION, TECHNOLOGY,
AND BUSINESS & DIGITAL
TRANSFORMATION LEADERS



IA FORUM

Collectively Driving Digital Transformation Excellence

MARCH & APRIL
EVENTS

Worldwide (Virtual) | Atlanta | New York City



- ❖ ROUNDTABLE DISCUSSIONS
- ❖ USE CASE PRESENTATIONS & PANEL DISCUSSIONS
- ❖ WORKSHOPS & LECTURES
- ❖ NETWORKING POWER HOURS
- ❖ DINNER PARTIES - ATLANTA & NYC



The IA FORUM Community

The IA FORUM is an exclusive by invitation only global community that consists of enterprise-wide C-Suite and senior-level executives within the fields of IA, AI, automation, technology, GBS/shared services, process improvement, and business & digital transformation - and functional area leaders leveraging automation to enhance operations. This distinguished group includes C-Suites, practitioners, functional area leaders, scientists, subject matter experts, thought leaders, authors, academics, and the top voices in the IA, AI, automation, technology, and business & digital transformation space. The community also extends to Core members' direct reports.

IA FORUM members are a vibrant group of professionals that value insight sharing, collaboration, and continuous improvement/skills development. They are part of a dynamic community that fosters an environment where members uplift one another, share innovative ideas, and work together to achieve IA, AI, and business & digital transformation excellence.

What We Do

The IA FORUM provides its members with year-round opportunities to attend **120+ virtual and in-person events annually**; benchmark, collaborate, and network with their direct and enterprise-wide peers; obtain highly valuable peer and industry insights; enhance their skill sets; and expand their professional network.

*** Vendors are excluded from participating in IA FORUM community activities.**

Below is a snapshot of the programs we offer.

INSIGHTS SHARING & COLLABORATION	TRAINING & CONTINUED EDUCATION	COMMUNITY SUPPORT & RESOURCES	NETWORKING EVENTS
▪ Roundtable Discussions ▪ Panel Discussions ▪ Use Case Presentations ▪ Lectures ▪ Thought Leadership Interviews ▪ Advisory Board Insights Forum ▪ Community Discussion Forum ▪ ROCK STAR Insights	▪ Workshops ▪ IA Training Courses ▪ Ivy League Technology Senior Management Educational Courses ▪ Industry White Papers & Reports ▪ IA FORUM YouTube Channel ▪ IA FORUM Magazine ▪ Technology Market Insights & Reports	▪ Peer Partnerships ▪ Mentorships ▪ <i>"In Transition"</i> Community Support ▪ IA FORUM Insider's Job Board	▪ Luncheons ▪ Dinner Parties ▪ Cocktail Receptions ▪ Networking Power Hours ▪ Networking Huddles ▪ Destination Retreats ▪ Bespoke Events Monthly Events NYC Chicago San Francisco Dallas Atlanta Boston DC Charlotte Toronto Corporate Retreats Hawaii, Bahamas, Napa Valley, Scottsdale, Barcelona, Venice, etc.

Join the IA FORUM and be part of a vibrant community collectively driving IA, AI, and business & digital transformation excellence.

IA FORUM MEMBERS



The IA FORUM is an exclusive by invitation only global community that consists of enterprise-wide C-Suite and senior-level executives within the fields of IA, AI, automation, technology, CoE, GBS/shared services, process improvement, and business & digital transformation - and functional area leaders leveraging automation to enhance operations. This distinguished group includes C-Suites, practitioners, functional area leaders, scientists, subject matter experts, thought leaders, authors, academics, and the top voices in the IA, AI, automation, technology, and business & digital transformation spaces. The community also extends to Core members' direct reports.

IA FORUM members are a vibrant group of professionals that value insight sharing, collaboration, continuous improvement, and skills enhancement. They are part of a dynamic community that fosters an environment where members uplift one another, share innovative ideas, and work together to achieve IA, AI, and business & digital transformation excellence.

** Vendors are excluded from participating in IA FORUM community activities.*

JOB TITLES	FUNCTIONAL AREAS & INDUSTRIES	ORGANIZATIONS
▪ C-Suites* ▪ Managing Directors* ▪ Senior Vice Presidents* ▪ Vice Presidents* ▪ Global Heads & Heads* ▪ Deputies* ▪ Executive Directors* ▪ Directors* ▪ Senior Managers* ▪ Analysts ▪ Leaders ▪ Engineers ▪ Architects ▪ Lean Six Sigma Belts ▪ Accomplished & Aspiring PhDs, MBAs & Alike* ▪ Thought Leaders ▪ Influencers ▪ Authors ▪ Technologists ▪ Scientists & Data Scientists* ▪ Researchers ▪ Academics ▪ Policy Leaders & Legislators ▪ <i>And Much More!</i> <i>Bolded with an asterisk equals the most common job seniority levels within the IA FORUM community.</i>	▪ IA (Intelligent Automation) ▪ AI (Artificial Intelligence) ▪ Generative AI & Automation ▪ Digital Transformation ▪ C-Suite ▪ Technology & IT ▪ CoE (Center of Excellence) ▪ Governance ▪ GBS (global business services) ▪ Shared Services ▪ Data & Cybersecurity ▪ Finance ▪ Operations & Process Improvement ▪ Business Transformation ▪ Employee & Customer Experience ▪ HR & Talent Management ▪ BFSI (Banking, Financial Services & Insurance) ▪ Marketing & Sales ▪ Policy & Ethics ▪ Academia ▪ Manufacturing ▪ Robotics ▪ Medical & Medicine ▪ Pharmaceutical ▪ Higher Education ▪ U.S. Federal Government ▪ The "Intelligence Community" ▪ <i>And Much More!</i>	▪ Bank of America ▪ Vonage ▪ DuPont ▪ Walmart ▪ McDonald's ▪ FBI ▪ Fannie Mae ▪ Visa ▪ CCS Medical ▪ Barnes & Noble ▪ BNY Mellon ▪ Omers ▪ Union Pacific Railway ▪ Con Edison ▪ American Heart Association ▪ NASA ▪ Microsoft ▪ Newell Brands ▪ Cargill ▪ Truist ▪ Merck ▪ The World Bank Group ▪ Best Buy ▪ Citizens Bank ▪ Citi ▪ AT&T ▪ Wells Fargo ▪ <i>And Much More!</i>

ADVISORY BOARD



The IA FORUM Advisory Board consists of C-Suite and senior-level executives within the fields of IA, AI, automation, technology, GBS/shared services, process improvement, and business & digital transformation. This includes practitioners, functional area leaders, scientists, SMEs, thought leaders, authors, academics, and the top voices in the field.



David Weild
Chairman & Chief Executive Officer, WEILD & CO. & Former Vice Chairman NASDAQ



Ryan Davis
Head of Category Management USAA



Stephen Harris
Former Corporate Vice President, Global Head of Data Science & AI Growth Analytics MICROSOFT



Erum Manzoor
Senior Vice President, Digital & Cloud Technology CITI



Richard Mackey
Chief Technology Officer CCS MEDICAL



Sudhanshu Duggal
Former Chief Information Officer & Regional Data Digital Strategy & AMEA Digital Experiences Leader PROCTER & GAMBLE



Santhosh Vijayabaskar
Director, Intelligent Automation & Process Excellence FIDELITY INVESTMENTS



Ian Barkin
Intelligent Automation Thought Leader, 2B VENTURES & Author "INTELLIGENT AUTOMATION"



Angela McKeirnan
Director, Global Product Lifecycle Management & Master Data SOLENIS



Jonathan Hardy
Head of Intelligent Automation Software Engineering TRUIST



Anurag Voleti
Former Chief Data Officer, BLUECROSS BLUESHIELD ASSOCIATION & Chief AI & Product Officer, STEALTH AI STARTUP



Danilo McGarry
Former Head of Artificial Intelligence, CITIGROUP & UHG & One of the World's Most Respected AI Practitioners & Voices Ranked Top 20 in the World for AI



Ramnath Natarajan
Director, Intelligent Automation & Enterprise Integration CoE JOHNSON CONTROLS



Sangram Dhumal
Director, Intelligent Automation & Data Engineering CoE OXFORD PROPERTIES



Vivek Goel
Chief Executive Officer & Chief Artificial Intelligence Strategist WELLNESS CONNECTION

Our greatest potential is unlocked when we work alongside those that challenge, inspire, and elevate us.

ADVISORY BOARD



The IA FORUM Advisory Board consists of C-Suite and senior-level executives within the fields of IA, AI, automation, technology, GBS/shared services, process improvement, and business & digital transformation. This includes practitioners, functional area leaders, scientists, SMEs, thought leaders, authors, academics, and the top voices in the field.



Emmanuel Lai
Vice President,
Intelligent Automation
WELLS FARGO



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



Dr. Hemil Dhami
Former Chief Data Scientist
PALL CORPORATION



Timothy Rund
Strategic Advisor & Senior
Leadership Executive
**U.S. FEDERAL GOVERNMENT &
MICROSOFT**



Riad Ardahji
Master Black Belt, Continuous
Improvement & Digital
Transformation Leader
DUPONT



Thomas Dixon
Senior Vice President
CITIZEN BANK



Vipin Jain
Director of Automation
CoE and Customer
Success & Innovation
OMERS



Andra Milender
Chief Mission Officer,
**WOMEN IN TECHNOLOGY
(WIT)** & Former USIS Chief
Technology Officer
EQUIFAX



Duffie Brunson
Research Sabbatical
& Director, Enterprise
Data Oversight
FANNIE MAE



John Jiang
PhD, Former Chief Research &
Solution Architect - Cloud Big
Data Architect & Data Scientist
HITACHI



Anand Parankussam
Former Director of RPA &
Digital Transformation Leader
ADIANT



Doug Shannon
Global Intelligent Automation &
GenAI Thought Leader & Global
Intelligent Automation Manager
**GLOBAL PHARMACEUTICAL
COMPANY**



Kenneth Newton
Director, Service Delivery,
NASA Shared
Services Center
NASA



Rahul Trivedi
Vice President,
Business Transformation
TRANSUNION



Camille Ready
Senior Director,
Intelligent Automation
COX ENTERPRISES



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

*Collective intelligence
emerges when a group of
people collaborate and
share ideas, elevating each
other's potential.*

ADVISORY BOARD



The IA FORUM Advisory Board consists of C-Suite and senior-level executives within the fields of IA, AI, automation, technology, GBS/shared services, process improvement, and business & digital transformation. This includes practitioners, functional area leaders, scientists, SMEs, thought leaders, authors, academics, and the top voices in the field.



Jerry Luftman
PhD, Founder, Professor & Managing Director
GLOBAL INSTITUTE OF IT MANAGEMENT & *Former Chief Information Officer, IBM*



Gaurav Basra
Chief Technology Officer
SSC.AI



Robert Towle
Author, "DON'T BE DUMB" & Senior Advisor
U.S. FEDERAL GOVERNMENT



Liz Popwell
Vice President, Systems Strategy & International
COMMONSPIRIT HEALTH



Riad Ardahji
Master Black Belt, Continuous Improvement & Digital Transformation Leader
DUPONT



Satish Palanisamy
Chief Enterprise Architect Officer
DISCOVER FINANCIAL SERVICES



Benjamin Coblentz
Senior Manager, Data & Technology
AMERICAN FAMILY INSURANCE



Matthew Kelly
Former Senior Vice President, Global Head of Digital Transformation & Intelligent Automation
NORTHERN TRUST ASSET MANAGEMENT

*By sharing knowledge, we lift each other up,
turning individual strength into collective power.*

Disclaimer: All IA FORUM programs follow the Chatham House Rule, ensuring open dialogue without attributing statements or information to any individuals or organizations. That said, the information/views expressed in IA FORUM events & presentations are those of the speaker & do not necessarily reflect the official position or opinions of their organization.

WHO CAN ATTEND



The majority of IA FORUM events are for members only - and vendors are NOT permitted to attend IA FORUM events.

However, every month we have a few events that:

- Members are **HIGHLY ENCOURAGED** to bring 1 - 2 internal/external colleagues or friends to attend a given event, as their VIP Guests. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially **JOINING** the IA FORUM sometime down the line.
- Are **"Open Network"** Events, which are events we allow NON-member executives to attend, to enable them to explore our community, whereas doing so will potentially lead them to **JOINING** the IA FORUM down the line.

Who Can Attend & Registration Process:

IA FORUM ADVISORY BOARD & MEMBERS	IA FORUM MEMBERS' VIP GUESTS	NON-MEMBER C-SUITES & SENIOR-LEVEL EXECUTIVES INVITED BY THE IA FORUM	ALL OTHER NON-MEMBER C-SUITES & SENIOR-LEVEL EXECUTIVES
Events They Can Attend: All IA FORUM events they qualify to attend. Qualification Requirements: IA FORUM members are pre-qualified. Event Registration Process: Register for events via the IA FORUM website. www.theiaforum.com	Events They Can Attend: Any event that is open to IA FORUM member's VIP Guests. Qualification Requirements: They must meet the IA FORUM membership qualifications and have a strong interest in potentially JOINING the IA FORUM down the line. <i>* To learn if they qualify, see the "IA FORUM Members" information.</i> Event Registration Process: - IA FORUM members must send Jules their internal/external colleagues' or friends' name, job title, and company information PRIOR to their guests registering for an event. - Once your potential VIP Guests have been "IM Approved", then they can register for a given event on the IA FORUM website. www.theiaforum.com Vendors can NOT attend IA FORUM events.	Events They Can Attend: Only "Open Network" Events the IA FORUM has invited them to attend. Qualification Requirements: They must meet the IA FORUM membership qualifications and have a strong interest in potentially JOINING the IA FORUM down the line. <i>* To learn more, see the "IA FORUM Members" information.</i> Event Registration Process: After you have been invited to an IA FORUM "Open Network" Event, simply go to the IA FORUM website and register for the event you have been invited to attend. www.theiaforum.com Vendors can NOT attend IA FORUM events.	Events They Can Attend: Only "Open Network" Events. Qualification Requirements: You must meet the IA FORUM membership qualifications and have a strong interest in potentially JOINING the IA FORUM down the line. <i>* To learn if you qualify, see the "IA FORUM Members" information.</i> Event Registration Process: If you qualify for IA FORUM membership, simply go to the IA FORUM website and register for the "Open Network" Event(s) you would like to attend. www.theiaforum.com Vendors can NOT attend IA FORUM events.

AN EXCLUSIVE AND VIBRANT COMMUNITY
FOR IA, AI, AUTOMATION, TECHNOLOGY, AND
BUSINESS & DIGITAL TRANSFORMATION LEADERS



IA FORUM
Collectively Driving Digital Transformation Excellence

SPEAKER FACULTY

Worldwide (Virtual) | Atlanta | New York City



SPEAKER FACULTY



The IA FORUM speaker faculty consists of C-Suite and senior-level executives within the fields of IA, AI, automation, technology, GBS/shared services, process improvement, and business & digital transformation. This includes practitioners, functional area leaders, scientists, SMEs, thought leaders, authors, academics, and the top voices in the field.



Sudhanshu Duggal
*Former Chief Information
Officer & Regional Data Digital
Strategy & AMEA Digital
Experiences Leader*
PROCTER & GAMBLE



Curt Burghart
Vice President, People Delivery
UNUM



Marty Samadder
*Cloud CoE, FinOps & Enterprise
Architecture Leader*
NOVELIS



Suzanne LaLena
*Senior Vice President,
Automation Engineering*
BNY MELLON



Ryan Davis
*Head of Category
Management*
USAA



Stephen Harris
*Former Corporate
Vice President,
Global Head of Data Science
& AI Growth Analytics*
MICROSOFT



Deji Adedayo
*Intelligent Automation &
Product Owner - North America*
GORDON FOOD SERVICE



Ian Barkin
*Intelligent Automation Thought
Leader, 2B VENTURES & Author
"INTELLIGENT AUTOMATION"*



Jennifer L. Mezzio
Global HR Data Officer
FIRST CITIZENS BANK



David Weild
*Chairman & Chief Executive
Officer, WEILD & CO.
& Former Vice Chairman*
NASDAQ



Jeff Machols
*Vice President, Head of
Continuous Improvement
Sustainability*
NEW YORK LIFE COMPANY



Anurag Voleti
*Former Chief Data Officer,
BLUECROSS BLUESHIELD
ASSOCIATION & Chief AI
& Product Officer,
STEALTH AI STARTUP*



Claire Grosjean
*Senior Director, Business
Process Management*
TECHNOLOGY CREDIT UNION



Kartik Kinhal
*Director, Engineering,
Automation & Data Analytics*
APPLIED MATERIALS



Santhosh Vijayabaskar
*Director, Intelligent Automation
& Process Excellence*
FIDELITY INVESTMENTS



Rex Patel
*Global Artificial Intelligence
& Automation Leader*
MATTHEWS INTERNATIONAL

*Learning is a journey best
taken with others, where
ideas are exchanged, and
possibilities become endless.*

SPEAKER FACULTY



The IA FORUM speaker faculty consists of C-Suite and senior-level executives within the fields of IA, AI, automation, technology, GBS/shared services, process improvement, and business & digital transformation. This includes practitioners, functional area leaders, scientists, SMEs, thought leaders, authors, academics, and the top voices in the field.



Nitin Agarwal
*Director, IT Supply
Chain Solutions*
MCKESSON



Robert Towle
*Author, "DON'T BE DUMB"
& Senior Advisor*
U.S. FEDERAL GOVERNMENT



Gaurav Basra
Chief Technology Officer
SSC.AI



Erum Manzoor
*Senior Vice President,
Digital & Cloud Technology*
CITI



Balaji Dhamodharan
*Global Software Analytics
Leader, Artificial Intelligence
& Machine Learning*
AMD



Ramnath Natarajan
*Director, Intelligent Automation
& Enterprise Integration CoE*
JOHNSON CONTROLS



Vipin Jain
*Director of Automation
CoE and Customer
Success & Innovation*
OMERS



Duffie Brunson
*Research Sabbatical
& Director, Enterprise
Data Oversight*
FANNIE MAE



Doug Shannon
*Global Intelligent Automation &
GenAI Thought Leader & Global
Intelligent Automation Manager*
**GLOBAL PHARMACEUTICAL
COMPANY**



Ryan Davis
*Senior Director of
Process Improvement &
Intelligent Automation*
ARVEST BANK



Swati Gupta
*Enterprise AI
Automation Lead*
LIBERTY BANK



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



Jules Miller
*Founder, Chief IA Insights
& Community Liaison Officer*
IA FORUM

***When we come together as a community, we don't just grow
- we thrive, learning from each other along the way.***

Disclaimer: All IA FORUM programs follow the Chatham House Rule, ensuring open dialogue without attributing statements or information to any individuals or organizations. That said, the information/views expressed in IA FORUM events & presentations are those of the speaker & do not necessarily reflect the official position or opinions of their organization.

AN EXCLUSIVE AND VIBRANT COMMUNITY
FOR IA, AI, AUTOMATION, TECHNOLOGY, AND
BUSINESS & DIGITAL TRANSFORMATION LEADERS



IA FORUM

Collectively Driving Digital Transformation Excellence

AGENDA

Worldwide (Virtual) | Atlanta | New York City



- ❖ ROUNDTABLE DISCUSSIONS
- ❖ USE CASE PRESENTATIONS & PANEL DISCUSSIONS
- ❖ WORKSHOPS & LECTURES
- ❖ NETWORKING POWER HOURS
- ❖ DINNER PARTIES - ATLANTA & NYC

AGENDA AT-A-GLANCE



MARCH

- *"IA GUILD" ROUNDTABLE DISCUSSION, Mon, March 3 - Reserved for "IA Guild" members*
- *NETWORKING POWER HOUR, Thur, March 6 - Members Only*
- *"C-SUITE COUNCIL" ROUNDTABLE DISCUSSION, Tues, March 11 - Reserved for "C-Suite Council" members*
- *ROUNDTABLE DISCUSSION & NETWORKING HUDDLE: BEST PRACTICES FOR BUILDING AND SCALING AN IA & AI COE, Wed, March 12 - Members Only*
- *NETWORKING DINNER PARTY, Fri, March 14, **Atlanta** - Member Event + Open to Members' VIP Guests*
- *PANEL DISCUSSION & NETWORKING HUDDLE: LEVERAGING IA & AI TO DRIVE ENHANCED BUSINESS VALUE, Tues, March 18 - Members Only*
- *WORKSHOP: LEVERAGING CUSTOMER EXPERIENCE JOURNEY MAPPING TO FORMULATE A LEAN PRODUCT ROADMAP FOR ARTIFICIAL INTELLIGENCE AND INTELLIGENT AUTOMATION, Wed, March 19 - Member Event + Open to Members' VIP Guests + "Open Network" attendees*
- *USE CASE & NETWORKING HUDDLE: PLAYBOOK TO WIN IN AN AI AGE - AN ENTERPRISE USE CASE VIEW, Fri, March 21 - Member Event + Open to Members' VIP Guests*
- *LECTURE & NETWORKING HUDDLE: GOVERNING DATA AT SCALE - ENSURING TRUST, VALUE & RESILIENCE, Mon, March 24 - Member Event + Open to Members' VIP Guests + "Open Network" attendees*
- *PANEL DISCUSSION & NETWORKING HUDDLE: HARNESSING IA & AI TO EMPOWER HUMAN POTENTIAL, Tues, March 25 - Members Only*
- *WORKSHOP: AGENTIC AI - UNLOCKING THE POWER OF AUTONOMOUS AGENTS, Wed, March 26 - Member Event + Open to Members' VIP Guests + "Open Network" attendees*

APRIL

- *"IA GUILD" ROUNDTABLE DISCUSSION, Tues, April 1 - Reserved for "IA Guild" members*
- *USE CASE & NETWORKING HUDDLE: AI-ENABLED WAREHOUSING & LOGISTICS - STRATEGIES FOR NEXT-GEN SUPPLY CHAINS, Wed, April 2 - Member Event + Open to Members' VIP Guests*
- *PANEL DISCUSSION & NETWORKING HUDDLE: MASTERING DATA ANALYTICS FOR ENTERPRISE-WIDE IMPACT, Fri April 4 - Members Only*
- *"C-SUITE COUNCIL" ROUNDTABLE DISCUSSION, Mon, April 7 - Reserved for "C-Suite Council" members*
- *ROUNDTABLE DISCUSSION & NETWORKING HUDDLE: UNLOCKING AI'S FULL POTENTIAL IN BFSI - INNOVATION, RISKS & REAL-WORLD IMPACT, Wed, April 9 - Members Only*
- *PANEL DISCUSSION & NETWORKING HUDDLE: NAVIGATING ARTIFICIAL INTELLIGENCE & DATA ETHICS - BALANCING INNOVATION, COMPLIANCE & TRUST, Tues, April 16 - Members Only*
- *NETWORKING POWER HOUR, Thur, April 17 - Members Only*
- *LECTURE & NETWORKING HUDDLE: DATA FIRST, AI NEXT - A ROADMAP FOR SUSTAINABLE INNOVATION, Tues, April 22 - Member Event + Open to Members' VIP Guests + "Open Network" attendees*
- *WORKSHOP: THE FUTURE OF AGENTIC & AI AGENTS IN ENTERPRISE - A STRATEGIC ROADMAP FOR INTEGRATION, Wed, April 23 - Member Event + Open to Members' VIP Guests + "Open Network" attendees*
- *NETWORKING DINNER PARTY, Fri, April 25, **New York City** - Member Event + Open to Members' VIP Guests*



MARCH



Mon, March 3 | 12:00pm - 1:00pm EST | **Zoom**

"IA GUILD" ROUNDTABLE DISCUSSION

Peer-to-peer discussion - and light food & beverage break.

Moderator: **Jules Miller**, *IA Insights & Community Liaison Officer*, **IA FORUM**

Members Only Event | Reserved for "IA Guild" members | Registration Required

Member Registration: \$0.00

Thur, March 6 | 12:00pm - 1:00pm EST | **Zoom**

NETWORKING POWER HOUR

Join your peers for a virtual networking power hour.

Moderator: **Jules Miller**, *IA Insights & Community Liaison Officer*, **IA FORUM**

Members Only Event | Registration Required

Member Registration: \$0.00

Tues, March 11 | 4:00pm - 5:00pm EST | **Zoom**

"C-SUITE COUNCIL" ROUNDTABLE DISCUSSION

Topic of discussion soon to come!

Moderator: **Jules Miller**, *IA Insights & Community Liaison Officer*, **IA FORUM**

Members Only Event | Reserved for IA FORUM "C-Suite Council" members | Registration Required

Member Registration: \$0.00

Knowledge is the key that unlocks potential and drives progress.



MARCH



Wed, March 12 | 12:00pm - 1:30pm EST | **Zoom**

ROUNDTABLE DISCUSSION & NETWORKING HUDDLE: BEST PRACTICES FOR BUILDING AND SCALING AN IA & AI CENTER OF EXCELLENCE

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

- Defining IA & AI CoEs - purpose, structure, and goals
- Building cross-functional collaboration across departments
- Overcoming challenges in IA & AI implementation, and adoption
- Governance and ethical IA & AI practices
- Measuring Success - KPIs and ROI for IA & AI initiatives

Swati Gupta, Enterprise AI Automation Lead, **LIBERTY BANK**

Kartik Kinhal, Director, Engineering, Automation & Data Analytics, **APPLIED MATERIALS**

Vipin Jain, Director of Automation CoE and Customer Success & Innovation, **OMERS**

** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.*

Members Only Event | Registration Required

Member Registration: \$0.00

Fri, March 14 | 6:00pm - 9:00pm local time | **Atlanta**

NETWORKING DINNER PARTY

Join your IA FORUM peers for lively conversation while enjoying a 4 - 5 star dining experience. The dinner will include: appetizer, salad, entree, dessert, coffee/tea, after dinner cordial, wine throughout the meal, and tax/tips.

Members Event + Open to Members' VIP Guests | Registration Required

Member Registration: \$350.00 pp | Members' VIP Guests' Registration: \$350.00 pp

** All members are HIGHLY ENCOURAGED to bring 1 internal/external colleague or friend to attend this event, as their VIP Guest. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.*

Learning is a journey best taken with others, where ideas are exchanged, and possibilities become endless.





Tues, March 18 | 12:00pm - 1:30pm EST | **Zoom**

PANEL DISCUSSION & NETWORKING HUDDLE: LEVERAGING IA & AI TO DRIVE ENHANCED BUSINESS VALUE

Intelligent automation and artificial intelligence technologies are no longer just industry buzzwords - they are game-changing tools driving measurable business value across various lines of business within organizations. However, identifying the right opportunities and implementing these technologies effectively can pose significant challenges. This panel discussion will explore how leading organizations are optimizing processes, enhancing decision-making, and achieving significant business outcomes utilizing AI and IA.

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

- Identifying high-impact areas for IA and AI implementation across various lines of business
- Strategies to align IA & AI initiatives with business goals and ROI
- Overcoming challenges like scalability, data readiness, and adoption barriers

Ramnath Natarajan, Director, Intelligent Automation & Enterprise Integration CoE, **JOHNSON CONTROLS**

Deji Adedayo, Intelligent Automation & Product Owner - North America, **GORDON FOOD SERVICE**

Rex Patel, Global Artificial Intelligence & Automation Leader, **MATTHEWS INTERNATIONAL**

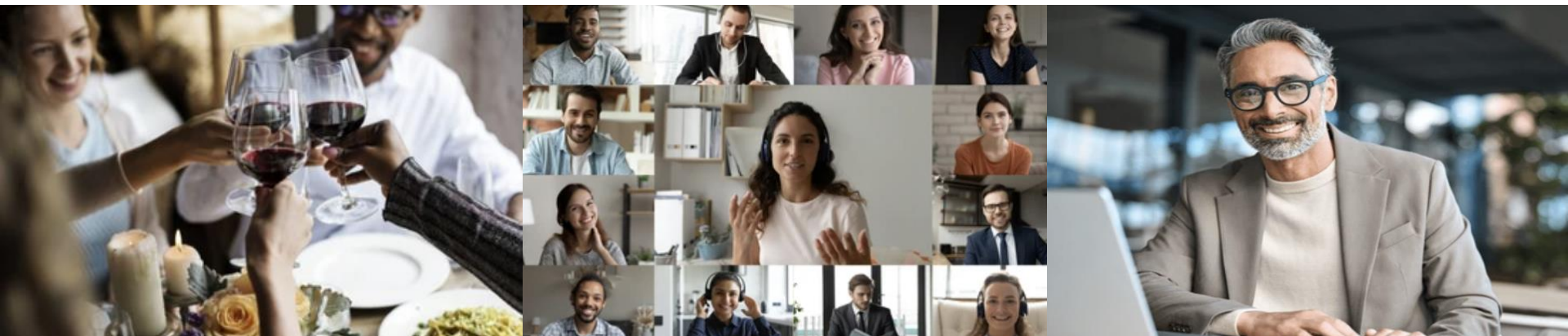
Moderator: **Kartik Kinhal**, Director, Engineering, Automation & Data Analytics, **APPLIED MATERIALS**

** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.*

Members Only Event | Registration Required

Member Registration: \$0.00

***When you share your knowledge, you light the way for others
and multiply your own potential.***





Wed, March 19 | 12:00pm - 2:00pm EST | **Zoom**

WORKSHOP: LEVERAGING CUSTOMER EXPERIENCE JOURNEY MAPPING TO FORMULATE A LEAN PRODUCT ROADMAP FOR ARTIFICIAL INTELLIGENCE AND INTELLIGENT AUTOMATION

In today's rapidly evolving digital landscape, understanding the customer experience is pivotal for designing and delivering products that meet market demands. This interactive workshop focuses on the powerful combination of customer experience (CX) journey mapping and lean product road mapping to formulate an agile, scalable strategy for integrating Artificial Intelligence and Intelligent Automation (IA) into enterprise product development. We'll explore how mapping customer touchpoints and pain points can guide the creation of a lean product roadmap, while ensuring AI and IA technologies are applied in the most impactful areas. We'll also walk through the process of using CX data to drive product decisions and prioritize features that enhance customer satisfaction, improve operational efficiency, and unlock new revenue streams through automation and smart AI solutions.

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

- Using journey maps to gain actionable insights into customer behavior, expectations, and pain points
- Aligning AI and IA technologies with business objectives and customer needs for maximum impact
- How to assess which AI and IA features deliver the highest value based on customer insights
- Identifying and addressing challenges in integrating AI and IA into product development
- Defining key performance indicators (KPIs) to evaluate the effectiveness of AI and IA initiatives
- Case studies on how enterprises have used CX journey mapping to streamline their AI/IA adoption and product delivery

Anurag Voleti, Former Chief Data Officer, BLUECROSS BLUESHIELD ASSOCIATION & Chief AI & Product Officer, STEALTH AI STARTUP

"Open Network" Event - this event is open to members' NON-member colleagues, to be their VIP Guests. It's also open to other NON-members. However, to attend, all NON-members must qualify to attend, and/or be invited by the IA FORUM.

Member Event + Open to Members' VIP Guests | Also an "Open Network" Event | Registration Required

Member Registration: \$0.00 | Members' VIP Guests' Registration: \$25.00 | NON-Member Registration: \$50.00

**** All members are HIGHLY ENCOURAGED to bring 1 - 2 internal/external colleagues or friends to attend this event, as their VIP Guests. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.***

When we come together as a community, we don't just grow - we thrive, learning from each other along the way.





Fri, March 21 | 10:00am - 11:15am EST | **Zoom**

USE CASE & NETWORKING HUDDLE: PLAYBOOK TO WIN IN AN AI AGE - AN ENTERPRISE USE CASE VIEW

In an era where artificial intelligence is reshaping industries, enterprises face a critical imperative: adapt strategically or risk obsolescence. In this use case presentation, we'll explore a pragmatic roadmap for C-Suite & technology executives to harness AI's transformative power. This presentation bridges the gap between AI's potential and actionable execution, focusing on high impact use cases from consumer goods covering a practitioner view on areas such as supply chain optimization, retail, digital commerce, customer experience personalization & predictive analytics - as well as use cases that will illustrate how AI-driven decision-making unlocks competitive advantages, from cost reduction to hyper-personalized engagement.

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

- Building scalable AI strategies, aligning technology investments with business outcomes, and fostering a culture of data-driven innovation
- Overcoming adoption barriers - data silos, talent gaps, ethical risks, etc.
- Critical C-Suite concerns, including ROI frameworks, risk mitigation, and the role of leadership in championing cross-functional AI adoption
- Leveraging AI to drive measurable ROI & balancing agility with governance

Sudhanshu Duggal, *Former Chief Information Officer & Regional Data Digital Strategy & AMEA Digital Experiences Leader*, **PROCTER & GAMBLE**

** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.*

Member Event + Open to Members' VIP Guests | Registration Required

Member Registration: \$0.00 | Members' VIP Guests' Registration: \$25.00

** All members are HIGHLY ENCOURAGED to bring 1 - 2 internal/external colleagues or friends to attend this event, as their VIP Guests. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.*

Mon, March 24 | 12:00pm - 1:30pm EST | **Zoom**

LECTURE & NETWORKING HUDDLE: GOVERNING DATA AT SCALE - ENSURING TRUST, VALUE & RESILIENCE

In today's data-driven economy, ensuring enterprise-wide data integrity, governance, and accessibility is no longer optional - it's critical for organizational success. This lecture will explore the pivotal role of enterprise data oversight in building resilient frameworks that align data strategy with business goals. Drawing from deep experience in large-scale oversight and governance, the event will focus on managing risks, streamlining processes, and enhancing decision-making with robust data governance practices.

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

- Building a scalable enterprise data governance framework
- Balancing data accessibility with security and compliance
- Identifying and mitigating risks in enterprise data ecosystems and best practices for aligning data oversight with business outcomes

Duffie Brunson, *Research Sabbatical & Director, Enterprise Data Oversight*, **FANNIE MAE**

** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.*

"Open Network" Event - this event is open to members' NON-member colleagues, to be their VIP Guests. It's also open to other NON-members. However, to attend, all NON-members must qualify to attend, and/or be invited by the IA FORUM.

Member Event + Open to Members' VIP Guests | Also an "Open Network" Event | Registration Required

Member Registration: \$0.00 | Members' VIP Guests' Registration: \$25.00 | NON-Member Registration: \$25.00

** All members are HIGHLY ENCOURAGED to bring 1 - 2 internal/external colleagues or friends to attend this event, as their VIP Guests. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.*



Tues, March 25 | 3:30pm - 4:45pm EST | **Zoom**

PANEL DISCUSSION & NETWORKING HUDDLE: HARNESSING IA & AI TO EMPOWER HUMAN POTENTIAL

Intelligent automation and artificial intelligence technologies are no longer just industry buzzwords - they are game-changing tools driving measurable business value across various lines of business within organizations. However, identifying the right opportunities and implementing these technologies effectively can pose significant challenges. This panel discussion will explore how leading organizations are optimizing processes, enhancing decision-making, and achieving significant business outcomes utilizing AI and IA.

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

- Identifying high-impact areas for IA and AI implementation across various lines of business
- Strategies to align IA & AI initiatives with business goals and ROI
- Overcoming challenges like scalability, data readiness, and adoption barriers

Claire Grosjean, *Senior Director, Business Process Management*, **TECHNOLOGY CREDIT UNION**

Jeff Machols, *Vice President, Head of Continuous Improvement Sustainability*, **NEW YORK LIFE COMPANY**

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

Moderator: **Robert Towle**, *Author, "DON'T BE DUMB" & Senior Advisor*, **U.S. FEDERAL GOVERNMENT**

** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.*

Members Only Event | Registration Required

Member Registration: \$0.00

Wed, March 26 | 3:00pm - 5:00pm EST | **Zoom**

WORKSHOP: AGENTIC AI - UNLOCKING THE POWER OF AUTONOMOUS AGENTS

Agentic AI transforms how businesses solve problems by enabling teams of autonomous systems to collaborate, reason, and act. This interactive workshop is designed to take you from understanding AI agents conceptually to deploying them in real-world applications. Through live demos, hands-on exercises, you'll gain practical insights into how to strategize, design and implement AI agents effectively.

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

- Foundations of Agentic AI - understanding the core principles and key technologies
- Designing Agentic Systems - structuring AI agents for scalability and efficiency
- Deployment & Governance - best practices for security, compliance, and monitoring
- Hands-On Experience - live demos and guided exercises to build AI agents in action

Santhosh Vijayabaskar, *Director, Intelligent Automation & Process Excellence*, **FIDELITY INVESTMENTS**

"Open Network" Event - this event is open to members' NON-member colleagues, to be their VIP Guests. It's also open to other NON-members. However, to attend, all NON-members must qualify to attend, and/or be invited by the IA FORUM.

Member Event + Open to Members' VIP Guests | Also an "Open Network" Event | Registration Required

Member Registration: \$0.00 | Members' VIP Guests' Registration: \$25.00 | NON-Member Registration: \$50.00

** All members are HIGHLY ENCOURAGED to bring 1 - 2 internal/external colleagues or friends to attend this event, as their VIP Guests. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.*



Tues, April 1 | 12:00pm - 1:00pm EST | **Zoom**
"IA GUILD" ROUNDTABLE DISCUSSION

Peer-to-peer discussion - and light food & beverage break.

Moderator: **Jules Miller**, *IA Insights & Community Liaison Officer, IA FORUM*

Members Only Event | Reserved for "IA Guild" members | Registration Required
Member Registration: \$0.00

Wed, April 2 | 3:30pm - 4:45pm EST | **Zoom**

USE CASE & NETWORKING HUDDLE: AI-ENABLED WAREHOUSING & LOGISTICS - STRATEGIES FOR NEXT-GEN SUPPLY CHAINS

AI is revolutionizing warehousing and logistics by enhancing automation, optimizing inventory management, improving transportation efficiency, and elevating quality control. This event will explore how enterprises can harness AI to drive operational agility, reduce costs, and improve decision-making across the supply chain. Through real-world use cases, we will discuss strategies for successful AI adoption and overcoming key implementation challenges.

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

- AI-Powered Warehouse Automation - leveraging robotics, AMRs, and predictive analytics to streamline operations and enhance efficiency
- Intelligent Inventory & Demand Forecasting - using machine learning to predict demand patterns, minimize waste, and optimize stock levels
- AI in Logistics & Transportation - enhancing route optimization, predictive maintenance, and last-mile delivery efficiency

Nitin Agarwal, *Director, IT Supply Chain Solutions, MCKESSON*

*** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.**

Member Event + Open to Members' VIP Guests | Registration Required
Member Registration: \$0.00 | Members' VIP Guests' Registration: \$25.00

*** All members are HIGHLY ENCOURAGED to bring 1 - 2 internal/external colleagues or friends to attend this event, as their VIP Guests. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.**





Fri April 4 | 3:30pm - 4:45pm EST | **Zoom**

PANEL DISCUSSION & NETWORKING HUDDLE: MASTERING DATA ANALYTICS FOR ENTERPRISE-WIDE IMPACT

Data is the lifeblood of modern enterprises, yet many organizations struggle to unlock its full potential. From IT to business functions, data analytics plays a pivotal role in driving operational efficiency, strategic decision-making & competitive advantage. However, the challenge lies in integrating analytics seamlessly across diverse enterprise teams, ensuring data quality & translating insights into real business value. Explore how enterprises are leveraging advanced data analytics strategies, tools and frameworks to drive tangible outcomes.

Topics of discussion will include, but are not limited to:

- Maximizing enterprise-wide data analytics adoption - bridging the gap between tech and business teams
- Overcoming data silos and governance challenges to ensure quality, security, and compliance
- Leveraging AI-driven analytics for real-time insights and predictive decision-making
- Aligning analytics strategies with business objectives to drive ROI and innovation

Balaji Dhamodharan, *Global Software Analytics Leader, Artificial Intelligence & Machine Learning, AMD*

Marty Samadder, *Cloud CoE, FinOps & Enterprise Architecture Leader, NOVELIS*

Anurag Voleti, *Former Chief Data Officer, BLUECROSS BLUESHIELD ASSOCIATION & Chief AI & Product Officer, STEALTH AI STARTUP - tentative*

Moderator: **Doug Shannon**, *Global Intelligent Automation & GenAI Thought Leader & Global Intelligent Automation Manager, GLOBAL PHARMACEUTICAL COMPANY*

*** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.**

Members Only Event | Registration Required

Member Registration: \$0.00

Mon, April 7 | 4:00pm - 5:00pm EST | **Zoom**

"C-SUITE COUNCIL" ROUNDTABLE DISCUSSION

Topic of discussion soon to come!

Moderator: **Stephen Harris**, *Former Corporate Vice President, Global Head of Data Science & AI Growth Analytics, MICROSOFT*

Members Only Event | Reserved for IA FORUM "C-Suite Council" members | Registration Required

Member Registration: \$0.00





Wed, April 9 | 12:00pm - 1:30pm EST | Zoom

ROUNDTABLE DISCUSSION & NETWORKING HUDDLE: UNLOCKING AI'S FULL POTENTIAL IN BFSI - INNOVATION, RISKS & REAL-WORLD IMPACT

Artificial Intelligence is reshaping the Banking, Financial Services, and Insurance (BFSI) sector, driving innovation in risk management, fraud detection, customer experience, and operational efficiency. However, despite the vast potential, the BFSI community face critical challenges in scalability, regulatory compliance, and AI integration across legacy systems.

Topics of discussion will include, but are not limited to:

- AI-driven transformation in BFSI - key use cases driving measurable business impact
- Addressing regulatory and compliance challenges while deploying AI solutions
- Enhancing fraud detection and risk management through advanced AI analytics
- Improving customer engagement and personalization with AI-driven automation

Ryan Davis, *Senior Director of Process Improvement & Intelligent Automation, ARVEST BANK*

Suzanne LaLena, *Senior Vice President, Automation Engineering, BNY MELLON*

*** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.**

Members Only Event | Registration Required

Member Registration: \$0.00

Tues, April 16 | 12:00pm - 1:30pm EST | Zoom

PANEL DISCUSSION & NETWORKING HUDDLE: NAVIGATING ARTIFICIAL INTELLIGENCE/DATA ETHICS - BALANCING INNOVATION, COMPLIANCE & TRUST

AI and data-driven decision-making are transforming industries, yet ethical risks, regulatory scrutiny, and governance challenges continue to pose significant hurdles for enterprises. From bias in AI models to data privacy laws and evolving compliance requirements, organizations must strike the right balance between innovation and responsible AI deployment.

Topics of discussion will include, but are not limited to:

- AI ethics in practice - avoiding bias, ensuring fairness, and promoting transparency
- Regulatory compliance in AI & data governance - navigating GDPR, CCPA, and emerging global regulations
- Building trust in AI - strategies for responsible AI development and deployment
- Aligning AI ethics with business goals - driving innovation while maintaining accountability

David Weild IV, *Chairman & Chief Executive Officer, WEILD & CO. & Former Vice Chairman & Executive Vice President, NASDAQ*

Jennifer L. Mezzio, *Global HR Data Officer, FIRST CITIZENS BANK*

Gaurav Basra, *Chief Technology Officer, SSC.AI*

Ian Barkin, *Intelligent Automation Thought Leader, 2B VENTURES & Author, "INTELLIGENT AUTOMATION" - tentative*

*** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.**

Members Only Event | Registration Required

Member Registration: \$0.00

Knowledge is the key that unlocks potential and drives progress.



Thur, April 17 | 4:00pm - 5:00pm EST | **Zoom**

NETWORKING POWER HOUR

Join your peers for a virtual networking power hour.

Moderator: **Jules Miller**, *IA Insights & Community Liaison Officer, IA FORUM*

Members Only Event | Registration Required

Member Registration: \$0.00

Tues, April 22 | 12:00pm - 1:30pm EST | **Zoom**

LECTURE & NETWORKING HUDDLE: DATA FIRST, AI NEXT - A ROADMAP FOR SUSTAINABLE INNOVATION

Is your organization truly ready for AI? Effective AI starts with effective data, and without strong foundations, even the most advanced AI initiatives will fail. In this thought-provoking discussion, discover why data management, regulatory compliance, and validation of AI outputs are critical to achieving real success.. Explore the importance of data curation, the need for rigorous AI validation, and how organizations can build resilient data ecosystems to drive sustainable AI success.

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

- The role of data management as the foundation for AI readiness and innovation
- How regulatory compliance is shaping better data practices across industries
- Why organizations must validate AI outputs and prioritize data quality
- Opportunities, challenges, and the role of curated, trusted data

Stephen Harris, *Former Corporate Vice President, Global Head of Data Science & AI Growth Analytics, MICROSOFT*

*** Final 30-minutes of event reserved for structured networking, hosted by the IA FORUM.**

“Open Network” Event - this event is open to members’ NON-member colleagues, to be their VIP Guests. It’s also open to other NON-members. However, to attend, all NON-members must qualify to attend, and/or be invited by the IA FORUM.

Member Event + Open to Members’ VIP Guests | Also an “Open Network” Event | Registration Required

Member Registration: \$0.00 | Members' VIP Guests' Registration: \$25.00 | NON-Member Registration: \$25.00

*** All members are HIGHLY ENCOURAGED to bring 1 - 2 internal/external colleagues of friends to attend this event, as their VIP Guests. However, all members’ VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.**

Together, we are stronger, wiser, and more capable of achieving our goals.



Wed, April 23 | 3:00pm - 5:00pm EST | **Zoom**

WORKSHOP: THE FUTURE OF AGENTIC & AI AGENTS IN ENTERPRISE - A STRATEGIC ROADMAP FOR INTEGRATION

As artificial intelligence continues to evolve, enterprises are confronted with a critical choice: which type of agent-driven technology - agentic or AI agents - should they integrate to optimize business operations? In this interactive workshop, we'll explore the differences between agentic agents and AI agents, delving into the strengths and limitations of each and how they can be strategically deployed within enterprise environments.

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

- Understanding Agentic vs. AI Agents - key differences, capabilities, and ideal use cases
- Strategic integration of agentic and AI agents into existing enterprise infrastructures
- Building a Hybrid Model - when and how to combine agentic agents with AI to maximize ROI
- Navigating Challenges - overcoming implementation barriers such as integration complexity, talent shortages, and ethical concerns

Doug Shannon, *Global Intelligent Automation & GenAI Thought Leader & Global Intelligent Automation Manager*, **GLOBAL PHARMACEUTICAL COMPANY**

"Open Network" Event - this event is open to members' NON-member colleagues, to be their VIP Guests. It's also open to other NON-members. However, to attend, all NON-members must qualify to attend, and/or be invited by the IA FORUM.

Member Event + Open to Members' VIP Guests | Also an "Open Network" Event | Registration Required

Member Registration: \$0.00 | Members' VIP Guests' Registration: \$25.00 | NON-Member Registration: \$50.00

** All members are HIGHLY ENCOURAGED to bring 1 - 2 internal/external colleagues or friends to attend this event, as their VIP Guests. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.*

Fri, April 25 | 6:00pm - 9:00pm local time | **New York City**

NETWORKING DINNER PARTY

Join your IA FORUM peers for lively conversation while enjoying a 4 - 5 star dining experience. The dinner will include: appetizer, salad, entree, dessert, coffee/tea, after dinner cordial, wine throughout the meal, and tax/tips.

Member Event + Open to Members' VIP Guests | Registration Required

Member Registration: \$350.00 pp | Members' VIP Guests' Registration: \$350.00 pp

** All members are HIGHLY ENCOURAGED to bring 1 internal/external colleague or friend to attend this event, as their VIP Guest. However, all members' VIP Guests MUST qualify to attend and have a strong interest in potentially JOINING the IA FORUM sometime down the line.*

Join your peers to uncover new insights, expand your network, and propel your career forward.

AN EXCLUSIVE AND VIBRANT
COMMUNITY FOR IA, AI,
AUTOMATION, TECHNOLOGY,
AND BUSINESS & DIGITAL
TRANSFORMATION LEADERS



IA FORUM

Collectively Driving Digital Transformation Excellence

JOIN

Worldwide (Virtual) | Toronto | NYC | Chicago | San Francisco | Dallas | Atlanta | Boston | DC | Charlotte



- ❖ Office: (347) 497-5713
- ❖ Cell: (646) 256-7050
- ❖ Email: info@theiaforum.com
- ❖ Website: www.theiaforum.com