

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



IA FORUM

Collectively Driving Digital Transformation Excellence

MEMBERSHIP GUIDEBOOK

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



- ❖ INSIGHTS SHARING & COLLABORATION
- ❖ TRAINING & CONTINUED EDUCATION
- ❖ COMMUNITY SUPPORT & RESOURCES
- ❖ NETWORKING & SPECIAL EVENTS

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ABOUT

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- ❖ ABOUT
- ❖ MISSION, CORE VALUES & POLICIES
- ❖ LEADERSHIP
- ❖ IA FORUM MEMBERS
- ❖ ADVISORY BOARD



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.



Our Mission

The IA FORUM was created to connect enterprise-wide C-Suite and senior-level executives from around the globe and 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. Our mission is to provide our members with a wide array of virtual and in-person events, special programs, resources, and networking opportunities designed to support them, their teams, and organizations throughout their IA, AI, and business & digital transformation journeys. We're also highly dedicated to offering support programs to our members that may find themselves *"in transition"*, uplifting and empowering them as they navigate new jobs or career paths.

Core Values

- **Positive, Enriching & Supportive Community:** We are committed to fostering a positive, enriching, and supportive community environment for our members. In turn, members are expected to share this core value, ensuring that our community remains a welcoming space where everyone can thrive and grow together.
- **Insight Sharing:** Sharing industry knowledge and best practices is at the heart of the IA FORUM. Members are expected to embrace this core value by contributing their expertise, thereby fueling the collective intelligence of the IA FORUM community.
- **Collaboration:** We provide our members with a wide array of opportunities for collaboration. In turn, we ask our members to embrace this core value, ensuring a community built on a foundation of peer support and collaboration.
- **Continuous Learning:** Lifelong learning is a core value of the IA FORUM, and we are dedicated to fostering a culture of continuous learning and growth. Members are expected to share this commitment by actively engaging with the IA FORUM programs designed to enhance their IA and digital transformation skills and knowledge base.
- **Member Engagement:** Active participation is a core value of the IA FORUM, essential for a thriving community. Members are expected to share this commitment, expanding their knowledge base, skills, and networks while contributing to the strength and growth of the broader IA FORUM community.
- **Content Neutrality & Integrity:** We uphold robust content integrity and neutrality protocols, excluding vendors from community activities to ensure that discussions remain free from commercial influence. We expect our members to adhere to these same core values and protocols.
- **Chatham House Rule:** All IA FORUM programs follow the Chatham House Rule, ensuring open dialogue without attributing statements to individuals or organizations.

Policies

- **Confidentiality & Data Security:** The IA FORUM maintains stringent standards to ensure compliance with industry protocols for confidentiality, data privacy, and security. Members are expected to uphold these same standards. We protect members' contact information and do not share it, except when necessary for coordinating peer partnerships and mentorships programs, and for event co-speakers' and Advisory Board meetings.
- **Vendor-Free Zone:** The IA FORUM community is a vendor-free zone. That said, **VENDOR SALES PITCHES/ENDORSEMENTS & SELF-PROMOTION are NOT permitted at anytime and doing so is grounds for membership cancellation.** However, there's a few ROCK STAR & Advisory Board members that have been welcomed to the IA FORUM, due to their thought leader status and high integrity and ethics to always be end-user/practitioner-centric, and by being so, they fully understand these IA FORUM core values and are fully committed to adhering to our very strict policy of NO VENDOR SALES PITCHES/ENDORSEMENTS OR SELF-PROMOTION.
- **VERY STRICT & HIGHLY REGULATED VENDOR Exceptions/Expanded Policy:** From time-to-time we allow solution providers and vendors to speak on IA FORUM events, and/or....feature their organization via the IA FORUM Magazine, IA FORUM YouTube Channel, or Vendor Directory on the website - as content placement or ad spots. And for a very select few, we allow them to be members, yet with the understanding they must adhere to our very strict policy of **NO VENDOR SALES PITCHES/ENDORSEMENT OR SELF-PROMOTION are permitted at anytime, not in any way, shape, or form.** Additionally, as an organization that highly respects our members' confidentiality and takes great measures to keep their information under wraps, under no uncertain terms are our members' names, emails, phone #s, or any of their other information shared with the solution providers or vendors that may participate or engage with the IA FORUM in some way. Or in other words, they are NEVER given access to our members' names, emails, phone #s, or a list of our members that attended their event, clicked on their content, ad spots, or directory listing.



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

Jules is the Founder, Chief IA Insights & Community Liaison Officer of the IA FORUM. She has extensive experience in producing large-scale conferences, content, educational, and networking programs for Fortune 500 companies, U.S. federal government and “intelligence community”, and public sector executives within the fields of IA, AI, technology, and business & digital transformation. For the past 10-years, she has conducted in-depth IA, AI, technology, and business & digital transformation market research, working closely with thousands of professionals in the fields, to develop highly successful programs that align with what they truly need and want to learn more about.

Furthermore, over the past 10-years, she has built a robust and impressive network of senior-level executives in the space, maintaining very close professional relationships with most of her contacts. In turn, the IA FORUM community launched with an impressive Advisory Board and membership base, thanks to her extensive connections. Known as the “Queen of Introductions” and someone that builds new and close business relationships daily, she takes great pride in leveraging her impressive network to help IA FORUM members expand their own professional networks.

Additionally, she has spent 30+ years in the event, conference, and content fields, as a senior-level Producer, Strategist, and Marketer. She began her event career as an Event Producer and Head of Events executive at two exclusive private membership social clubs. She also served as the Events & Marketing Director at the NYSE’s highly exclusive social club, the SELC, and as a Conference Producer and Head of Production executive at other well-known B2B conference and content organizations.

Her passion for learning, high standards of excellence, and deep interest in the space have earned her an exceptional reputation within the IA, technology, and digital transformation community - and she consistently creates programs that align with their needs.



Sandra Miller
*Executive Event Producer &
Global Director, Community Engagement*
IA FORUM

Sandra is the Executive Event Producer & Global Director, Community Engagement for the IA FORUM. She brings over 20-years of global senior leadership experience in producing high-profile, big budget commercials, documentaries, short films, music videos, consumer product activation programs, experiential events, and content productions, for such clients as Google, Microsoft, MIT, Cognizant, SXSW, the U.S. Open, Mastercard, Target, PGA Tour, Verizon, BMW, and much more.

She has held the roles of Head of Branded Content & Production at Vice Media, Senior Vice President of Content & Experiential Events at Momentum Worldwide, Senior Executive Producer at Mas Event Design, Head of Production at the Production Farm, and similar posts as a Freelance Executive Producer in the film, commercials, experiential events, and consumer activation fields.

Her expertise spans managing multi-million-dollar budgets, overseeing global production teams, and delivering impactful programs that combine creativity, strategy, and flawless execution. Sandra’s expertise in producing innovative, big budget, flawless, and highly valuable event experiences for Fortune 100 companies aligns perfectly with the IA FORUM’s high standards of excellence - and our commitment to providing our members with exceptional event, content, special programs, and networking opportunities.

We look forward to working with you!

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.

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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.

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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.

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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.

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COMMUNITIES

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- ❖ PRIMARY COMMUNITIES
- ❖ FOCUS & SPECIALITY COMMUNITIES
- ❖ “C-SUITE COUNCIL” COMMUNITY

PRIMARY COMMUNITIES



The IA FORUM consists of two primary communities: Core and Team. The “C-Suite Council” community is for Core members that are C-Suites and decide to join the “C-Suite Council” membership plan. By doing so, they automatically belong to both communities and have full access to all the Core and “C-Suite Council” membership benefits.

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

CORE COMMUNITY	TEAM COMMUNITY	“C-SUITE COUNCIL” COMMUNITY
The Core community is made up of senior-level executives from around the globe and 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 includes 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 IA FORUM programs and communities are primarily designed for Core members. However, they can NOT participate in “C-Suite Council” events and programs unless they’re also a “C-Suite Council” member. 90% of the membership community, with 10% of this percentage being C-Suite executives	The Team community consists of Core members’ direct reports. These individuals are not at the same or similar career level as Core members but instead support their initiatives. Although there are some Core events and programs Team members can NOT participate in, there’s still a wide array of events and programs they can access, including events and programs specifically designed for them. 10% of the membership community	The IA FORUM’S “C-Suite Council” community is an exclusive membership designed for CEOs, CFOs, COOs, CPOs, CMOs, CHROs, CIOs, CTOs, CISOs, CDOs, CAIOs, CXOs, CROs, CAOs, and alike, providing C-Suite executives with exclusive programs that enable them to benchmark, collaborate, and network with their direct peers and enterprise-wide C-Suite colleagues. “C-Suite Council” members have full access to all Core member programs and communities. In addition to Core events and programs, they also have a wide array of events and program specifically designed for them and only they can participate in. 10% of the overall 90% of the entire membership community

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



FOCUS & SPECIALITY COMMUNITIES



In addition to the Core community all Core and “C-Suite Council” members automatically belong to, there's also 9 focus and 9 specialty communities they can choose to join. We highly encourage all Core and “C-Suite Council” members to join up to 5 focus and 5 specialty communities they have a “vested” interest in joining. These communities are designed to help Core and “C-Suite Council” members connect, share insights, collaborate, and benchmark with their direct peers, thereby creating highly impactful experiences. By joining a niche community, they also gain access to highly targeted and relevant content on the topics that matter most to them.

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FOCUS COMMUNITIES	SPECIALITY COMMUNITIES
▪ IA, AI & Digital Transformation ▪ Technology & IT ▪ CoE (Center of Excellence) ▪ Operations & Process Improvement ▪ Finance ▪ Procurement & Supply Chain ▪ Employee & Customer Experience ▪ HR & Talent Management ▪ Marketing & Sales <i>* Reserved for Core and “C-Suite Council” members.</i>	▪ C-Suite - <i>must qualify to join this community.</i> ▪ Women In Technology - <i>all females and those that identify as she/her are highly encouraged to join this community.</i> ▪ BFSI (Banking, Financial Services & Insurance) ▪ U.S. Federal Government, Higher Education & Public Sector ▪ Medical & Healthcare Innovation ▪ Robotics & Technology Innovation ▪ IA Council (Thought Leaders, Academics & Rock Stars) - <i>must qualify to join this community.</i> ▪ IA Guild (for our “In Transition” members) - <i>must qualify to join this community.</i> ▪ Vendor Analysis <i>* Reserved for Core and “C-Suite Council” members.</i>

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





The IA FORUM's "C-Suite Council" community is an exclusive membership designed for CEOs, CFOs, COOs, CAOs, CPOs, CMOs, CHROs, CIOs, CTOs, CISOs, CDOs, CAIOs, CXOs, CROs, and alike, providing them with exclusive programs that enable them to benchmark, collaborate, and network with their direct and enterprise-wide C-Suite peers.

FUNCTIONAL AREAS	INDUSTRIES & SECTORS
▪ Chief Executive Officers ▪ Chief Financial Officers ▪ Chief Operating Officers ▪ Chief Procurement Officers ▪ Chief Information Officers ▪ Chief Technology Officers ▪ Chief Data Officers ▪ Chief Digital Officers ▪ Chief Information Security Officers ▪ Chief Artificial Intelligence Officers ▪ Chief Marketing Officers ▪ Chief Revenue Officers ▪ Chief Experience Officers ▪ Chief Human Resources Officers ▪ Chief People Officers ▪ Chief of Staff ▪ <i>And Alike!</i> C-Suites, Secretaries, Deputies, Heads, and Executive Directors within the U.S. federal government and international government agencies, research labs, think tanks, policy councils, law enforcement, the "intelligence community", NGOs, non-profits, and alike qualify for this community.	▪ Academia & Higher Education ▪ Agriculture & Food Production ▪ BFSI (Banking, Financial Services & Insurance) ▪ Construction & Real Estate ▪ Energy & Utilities ▪ Government, Public Administration & the "Intelligence Community" ▪ Healthcare & Medical ▪ Manufacturing & Industrial ▪ Pharmaceuticals & Biotechnology ▪ Policy & Ethics ▪ Research ▪ Retail & Consumer Goods ▪ Robotics & Automation ▪ Technology & Software ▪ Telecommunications ▪ Transportation & Logistics ▪ <i>And Much More!</i>



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- ❖ INSIGHTS SHARING & COLLABORATION
- ❖ TRAINING & CONTINUED EDUCATION
- ❖ NETWORKING & SPECIAL EVENTS
- ❖ "C-SUITE COUNCIL" PROGRAMS
- ❖ COMMUNITY SUPPORT RESOURCES & PROGRAMS



IA FORUM programs are designed to empower our members through impactful insights sharing, learning and development, and networking opportunities. By participating in these programs, members not only advance their own careers but also contribute to the collective intelligence of the IA FORUM community, as well as the growth and excellence of the overall IA, AI, automation, technology, and business & digital transformation spaces.

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INSIGHTS SHARING & COLLABORATION	TRAINING & CONTINUED EDUCATION	COMMUNITY SUPPORT & RESOURCES	NETWORKING & SPECIAL 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 ▪ “In Transition” Community Support programs ▪ IA FORUM Insider’s Job Board	▪ Luncheons ▪ Dinner Parties ▪ Cocktail Receptions ▪ Networking Power Hours ▪ Networking Huddles ▪ Destination Retreats ▪ Bespoke Events In-Person Events NYC Chicago San Francisco Dallas Atlanta Boston DC Charlotte Toronto Destination Retreats Hawaii, Bahamas, Napa Valley, Scottsdale, Barcelona, Venice, etc.

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



INSIGHTS SHARING & COLLABORATION



The IA FORUM provides its members with diverse opportunities for insight sharing and collaboration. Through a variety of tailored programs, members can enhance their skill sets and knowledge-base while expanding their professional networks.

All non-discussion based VIRTUAL events have an extra 30-minutes built into them, to provide members with enhanced **NETWORKING** opportunities. The event's extra **NETWORKING** time is hosted and facilitated by the IA FORUM.

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ROUNDTABLE DISCUSSIONS	PANEL DISCUSSIONS	USE CASE PRESENTATIONS	LECTURES
1-hour virtual group discussions - Variety of topics, to discuss IA, AI, automation, technology, and business & digital transformation project and program implementation roadblocks and solutions, benchmarking, best practices, industry trends and technologies, and much more 10 - 30 participants <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>	45 - 60 minutes virtual panel discussions with audience Q&As - Variety of topics, to share insights on IA, AI, automation, technology, and business & digital transformation stories, emerging technologies, innovations, best practices, industry trends, and much more - Content developed and presented by members <i>* Open to Core, Team, and "C-Suite Council" members - and their VIP Guests, and...to "Open Network" event invitees.</i>	45 - 60 minutes virtual live or pre-recorded use case presentations - Variety of topics, to share insights on IA, AI, automation, technology, and business & digital transformation use cases - Content developed and presented by members <i>* Open to Core, Team, and "C-Suite Council" members - and their VIP Guests.</i>	45 - 120 minutes virtual live or pre-recorded lectures - Variety of topics, to share insights on IA, AI, automation, technology, and business & digital transformation use cases, emerging technologies, innovations, best practices, industry trends, and much more - Content developed and presented by members <i>* Open to Core, Team & "C-Suite Council" members - and their VIP Guests, and...to "Open Network" event invitees - additional costs apply.</i>
THOUGHT LEADERSHIP INTERVIEWS	ADVISORY BOARD INSIGHTS FORUM	COMMUNITY DISCUSSION FORUM	ROCK STAR INSIGHTS
30 - 45 minutes virtual live or pre-recorded interviews - Variety of topics, to share insights on IA, AI, automation, technology, and business & digital transformation use cases, emerging technologies, innovations, best practices, industry trends, and much more - Members interviewed by the IA FORUM <i>* Open to Core, Team, and "C-Suite Council" members - and their VIP Guests.</i>	- An online discussion forum that provides unbiased, end-user perspectives and in-depth analysis on the topics that matter most to our members - Topic examination of a variety of IA, AI, automation, technology, and business & digital transformation topics, stories, and much more - Consists of IA FORUM Advisory Board members <i>* Reserved for Core and "C-Suite Council" members.</i>	- An online peer-to-peer interactive discussion forum where members can share their unbiased, end-user thoughts on the topics that matter most to them and the broader IA FORUM community - Consists of Core members <i>* Reserved for Core and "C-Suite Council" members.</i>	- A premier series of programs by the major ROCK STARS in the IA, AI, automation, technology, and business & digital transformation space - Educational and insightful workshops, "how to" video tutorials, insights video shorts, special content, and other special programs <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>

TRAINING & CONTINUED EDUCATION



The IA FORUM provides its members with diverse opportunities for professional development and continued education. Through a variety of tailored programs, members can enhance their skill sets and knowledge-base, while obtaining valuable insights from internal & external experts and resources.

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

WORKSHOPS	IA TRAINING COURSES	IVY LEAGUE TECHNOLOGY SENIOR MANAGEMENT EDUCATIONAL COURSES	THOUGHT LEADERSHIP INTERVIEWS
2-hours virtual interactive workshops - Variety of topics, to share insights on IA, AI, automation, technology, and business & digital transformation stories, emerging technologies, innovations, best practices, industry trends, and much more - Content developed and presented by members 10 - 30 participants <i>* Open to Core, Team, and "C-Suite Council" members - and their VIP Guests, and...to "Open Network" event invitees - additional costs apply.</i>	6 - 8 hours virtual training courses - Content developed and presented by an IA FORUM Advisory Board member 10 - 40 attendees <i>* Open to Core, Team, and "C-Suite Council" members - and their VIP Guests, and...to "Open Network" event invitees - additional costs apply.</i>	20 - 40 hours virtual courses - CIO, CTO & Technology Senior Management educational courses - Courses developed and facilitated by Professors from such prestigious universities as MIT, Wharton, Oxford, Princeton, Carnegie Mellon, etc. - Curriculum developed by the "Global Institute for IT Management", university Professors & the IA FORUM <i>* Open to Core and "C-Suite Council" members - and their VIP Guests, and...to "Open Network" event invitees - additional costs apply.</i>	45-minutes virtual live or pre-recorded interviews - Variety of topics, to share insights on IA, AI, automation, technology, and business & digital transformation use cases, emerging technologies, innovations, best practices, industry trends, and much more - Members interviewed by the IA FORUM <i>* Open to Core, Team, and "C-Suite Council" members - and their VIP Guests.</i>
EVENT VIDEOS HUB	INSIGHTS LIBRARY	IA FORUM YOUTUBE CHANNEL	IA FORUM MAGAZINE
A private video collection of past IA FORUM Panel Discussions, Use Case Presentations, Lectures, and Thought Leadership Interviews. Available "On Demand", anytime, anywhere. <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>	A private collection of IA FORUM members' Use Case Presentations, past event presentations, and Digital Thought Leadership Interviews, along with publicly available industry white papers and reports. <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>	The IA FORUM YouTube Channel consists of publicly available videos on topics that matter most to our members. The channel has 12 playlists & nearly 1,000 videos. The channel includes videos from recent thought leadership interviews and event keynote presentations, podcasts, event conference sessions, virtual events, TV news reports and lectures from renown universities and experts in the IA, AI, automation, technology, and business & digital transformation space. <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>	The IA FORUM Magazine is an exclusive digital publication designed specifically for IA FORUM members. The magazine is powered by an AI-driven system that pulls thousands of news articles/content from the world's top publications/media outlets. In turn, the IA FORUM curates articles and content that directly reflects the stories that matter most to our members. <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>

NETWORKING EVENTS



Throughout the year, the IA FORUM hosts over 20+ exclusive luncheons, dinner parties, and cocktail receptions across the U.S. These networking events are designed to connect members with peers that share similar expertise and interests, fostering meaningful discussions on topics that matter most to them, while providing opportunities to build new relationships and strengthen existing ones.

Additionally, every month there are several virtual networking events, such as Networking Power Hours and Networking Huddles. **Furthermore, all non-discussion based VIRTUAL events have an extra 30-minutes built into them**, to provide members with enhanced **NETWORKING** opportunities. The event’s extra **NETWORKING** time is hosted and facilitated by the IA FORUM.

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

In-Person Networking Events NYC | Chicago | San Francisco | Dallas | Atlanta | Boston | DC | Charlotte | Toronto

LUNCHEONS	DINNER PARTIES	COCKTAIL RECEPTIONS	VIRTUAL NETWORKING POWER HOURS & HUDDLES
▪ 1 1/2 hours ▪ Locations vary throughout the year ▪ 10+ per year ▪ 10 - 30 attendees <i>* Reserved for Core and “C-Suite Council” members - and their VIP Guests - additional costs apply.</i>	▪ 3-hours ▪ Locations vary throughout the year ▪ 10+ per year ▪ 10 - 30 attendees <i>* Reserved for Core and “C-Suite Council” members - and their VIP Guests - additional costs apply.</i>	▪ 3-hours ▪ Locations vary throughout the year ▪ 5+ per year ▪ 30 - 60 attendees <i>* Open to Core, Team, and “C-Suite Council” members - and their VIP Guests - additional costs apply.</i>	▪ 1-hour ▪ Relaxed and casual get togethers ▪ 12 per year ▪ 10 - 30 attendees <i>* Open to Core, Team, and “C-Suite Council” members.</i>

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it ignites a sense of community and shared purpose.*



DESTINATION RETREATS



Every year the IA FORUM provides its members with extraordinary journeys that blend professional growth with unforgettable experiences. Our members only Destination Retreats are designed to provide the perfect blend of mini-conference programming, meaningful networking, and exciting activities in some of the world's most stunning destinations.

Each retreat spans 3 - 4 days and offers a carefully curated itinerary to ensure you leave feeling refreshed, inspired, and better connected with your fellow IA FORUM members.

Destinations include such locations as Hawaii; Scottsdale; Napa Valley, Venice, Italy & Many Other U.S. & International Destinations.

Retreats include, yet will not be limited to:

- **Mini-Conference Programming:** Attend thought-provoking mini-conference sessions designed to spark ideas and drive innovation.
- **Exclusive Networking Opportunities:** Connect with your like-minded IA FORUM members in relaxed, intimate settings, fostering genuine and lasting relationships.
- **Exciting Activities & Adventures:** Experience local culture through curated activities, guided excursions, and much more.
- **Relaxation & Rejuvenation:** Enjoy downtime with access to luxury amenities and serene surroundings.

These retreats are more than just events - they're a chance to gain fresh perspectives on industry challenges and opportunities, build a stronger professional network, reignite your creativity and passion in inspiring settings, and make memories that last a lifetime while advancing your industry knowledge-base and skill sets.

Please Note...

These retreats are open to all Core members, yet Team members do not qualify to attend. There's also additional retreats throughout the year, specifically designed for our "C-Suite Council" members - additional costs apply.

Be part of shared experiences that create enhanced and long-lasting community bonds and alliances.



"C-SUITE COUNCIL" PROGRAMS



The IA FORUM'S "C-Suite Council" community is an exclusive membership designed for CEOs, CFOs, COOs, CPOs, CMOs, CHROs, CIOs, CTOs, CISOs, CDOs, CAIOs, CXOs, CROs, CAOs, and alike, providing C-Suite executives with exclusive programs that enable them to benchmark, collaborate, and network with their direct peers and enterprise-wide C-Suite colleagues.

The below offerings are additional benefits available to "C-Suite Council" members, complementing their default corporate Core membership.

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

KEYNOTE C-SUITE PRESENTATIONS & WORKSHOPS	"C-SUITE COUNCIL" DESTINATION RETREATS	"C-SUITE COUNCIL" CHALLENGES & SOLUTIONS WORKSHOPS	"C-SUITE COUNCIL" DINNER & COCKTAIL PARTIES
60 - 90 minutes Keynote C-Suite virtual presentations & workshops - Led by renowned C-Suite executives from globally recognized organizations - Topics include, strategic execution, operational efficiency, leadership and culture, financial performance, risk management, innovation and growth, and stakeholder satisfaction. 10 - 20 attendees * Reserved for "C-Suite Council" members - additional costs apply.	3 - 4 days destination retreats, to such locations as Hawaii, Bahamas, Napa Valley, Scottsdale, Venice, etc. - Business discussions and leadership forums built into each day's agenda. - Trips include a wide array of relaxing sports, spa & entertainment activities and networking opportunities. - Retreats include mini-conference programming, all meals and social & business activities. * Reserved for "C-Suite Council" members - additional costs apply.	2-hours virtual interactive workshops - Variety of topics, to share insights on IA, AI, automation, technology, and business & digital transformation challenges and solutions. - Content developed and presented by C-Suite Council members 10 - 20 participants * Reserved for "C-Suite Council" members.	4-hours - Locations vary throughout the year 6 - 8 per year 10 - 20 attendees * Reserved for "C-Suite Council" members - additional costs apply.
"C-SUITE COUNCIL" USE CASE PRESENTATIONS	"C-SUITE COUNCIL" ROUNDTABLE DISCUSSIONS	"C-SUITE COUNCIL" 1:1 INTRODUCTIONS	"C-SUITE COUNCIL" DISCUSSION FORUM
45 - 60 minutes virtual use case presentations - Variety of topics, to share insights on IA, AI, automation, technology, and business & digital transformation use cases. - Content developed and presented by "C-Suite Council" members 10 - 20 attendees * Reserved for "C-Suite Council" members.	1-hour virtual group discussions - Topics include, IA, AI, automation, technology & business/digital transformation strategy, long-term planning/implementation, policy, leadership/organizational culture, risk management/emerging technologies. 10 - 20 participants * Reserved for "C-Suite Council" members.	- Year-round & ongoing 1:1 introductions between the "C-Suite Council" members. - Introductions facilitated by the IA FORUM, in compliance to GDPR guidelines. * Reserved for "C-Suite Council" members.	- A private online peer-to-peer interactive discussion forum where "C-Suite Council" members can share their unbiased, end-user thoughts on the topics that matter most to them. - Consists of "C-Suite Council" members * Reserved for "C-Suite Council" members.

Be part of an elite network of C-Suites shaping enterprise-wide business and digital transformation.

PEER PARTNERSHIPS & MENTORSHIPS



All IA FORUM Core, Team, and “C-Suite Council” members are automatically enrolled in the Peer Partnerships and/or Mentorships programs. Active participation in these programs is a vital part of membership, ensuring that everyone can experience the full benefits of the IA FORUM community. These impactful programs are designed to promote shared professional growth and foster meaningful connections among members.

The Peer Partnerships program pairs Core and “C-Suite Council” members with peers that share similar expertise and industry focus, creating a collaborative dynamic for addressing challenges, exchanging insights, and supporting each other’s current and long-term business goals. The Mentorships program bridges the gap between Core and Team members, providing Team members with a structured yet flexible framework for skill development and professional growth.

By engaging in these programs, every member has the chance to deepen their connections, learn from diverse perspectives, and contribute to a thriving community. By embracing these opportunities, we strengthen the bonds within our community and enhance the value that the IA FORUM offers to every member.

PEER PARTNERSHIPS	MENTORSHIPS
▪ 2-month 1:1 virtual program ▪ Peer Partnerships consist of 2 Core or “C-Suite Council” members of similar career level and functional focus area ▪ Peer Partners get together weekly or bi-weekly for 30 - 60 minutes ▪ Peer Partners determine how they will spend their time together, to discuss, collaborate, benchmark, share insights, and bounce ideas off each other, as it relates to similar business challenges they may be experiencing, their current and upcoming projects, or other business topics they feel comfortable sharing with each other ▪ Not only does this program offer Core and “C-Suite Council” members an opportunity to benchmark with their direct peers, but it also helps them build meaningful relationships with peers outside their organization, further enhancing their professional network ▪ 2 per year, per Core or “C-Suite Council” member <i>* Reserved for Core and “C-Suite Council” members.</i>	▪ 2-month 1:1 virtual program ▪ Mentorships consist of 1 Core and 1 Team member working within similar functional areas ▪ Mentors and Mentees get together weekly or bi-weekly for 30 - 60 minutes ▪ Mentors and Mentees determine how they will spend their time together, to discuss and address a variety of business skill sets, technologies, best practices, or perhaps even business challenges the Mentee is experiencing at work, so the Mentor can provide them with insights and advice on how to best tackle x situations ▪ They decide upon the best learning methods and styles that would enable the Mentee to achieve their learning objectives, which may include project assignments, tests, or evaluations ▪ Not only does this program offer Team members an opportunity to enhance their skill sets, but it also helps them build meaningful relationships with senior-level executives that can enhance their performance within your organization ▪ 2 per year, per Team member <i>* Reserved for Team members - and their mentors.</i>

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

IA FORUM INSIDER'S JOB BOARD



The IA FORUM Insider's Job Board is a private job board designed exclusively for IA FORUM Core and "C-Suite Council" members that are exploring new job opportunities or are currently "in transition" - as well as for companies seeking top IA, AI, automation, technology, GBS/shared services, process improvement, and business & digital transformation talent. The private job board allows Core and "C-Suite Council" members, their companies, and select non-member vendors to post job opportunities that align perfectly with the expertise of IA FORUM members.

By leveraging the IA FORUM Insider's Job Board, Core and "C-Suite Council" members gain a significant advantage in discovering exclusive job opportunities that closely align with their professional backgrounds. When a member's company or non-member vendor posts a job on the IA FORUM Insider's Job Board, it can tap into the exceptional IA, AI, automation, technology, and business & digital transformation professionals within the IA FORUM community.

The job board includes full-time jobs - as well as short and long-term consulting and freelance gigs.

The IA FORUM Insider's Job Board is available to Core and "C-Suite Council" members. **Team members do NOT have access to this program.**

The job board operates on a third-party platform, entirely independent and separate from a member's IA FORUM account. Any activity on the job board is completely confidential and will not be reflected or recorded in a member's IA FORUM account history, ensuring full privacy from their current employer and anyone else within and outside the IA FORUM.

Success often comes from knowing the right people and being in the right place at the right time.



"IN TRANSITION" COMMUNITY SUPPORT



The IA FORUM is first and foremost a community. That said, as a community, the IA FORUM provides its members with a wide array of events, resources, tools, and networking opportunities to our members that may find themselves *"in transition"* throughout their career, so to uplift and empower them as they navigate new jobs or career paths.

For members that prefer to keep their *"in transition"* status completely confidential, then **100% CONFIDENTIALITY IS GUARANTEED**. However, since we're all friends within the IA FORUM community, we encourage you to let us know when you might be *"in transition"*, so we can in turn align you with the below highly value programs.

IA FORUM INSIDER'S JOB BOARD	VIRTUAL JOB FAIRS	"IN TRANSITION" COMMUNITY SUPPORT ROUNDTABLE DISCUSSIONS	JOB SEARCH UPSKILLING WORKSHOPS, VIDEO TUTORIALS & INSIGHTS
- A private job board for IA FORUM Core & "C-Suite Council" members that are exploring new job opportunities or are currently <i>"in transition"</i> - and for companies seeking top IA, AI, technology, and business & digital transformation talent - By leveraging the IA FORUM Insider's Job Board, Core and "C-Suite Council" members gain a significant advantage in discovering exclusive job opportunities - The job board includes full-time jobs and consulting & freelance gigs	2 - 3 hours virtual job fair - Consist of members that are currently HIRING & members OPEN TO WORK - A job fair with a social networking vibe with lots of PRIVATE Zoom breakout rooms for members to privately discuss current and potential full-time, consulting, and freelance gigs	1 - 2 hours roundtable discussions - Variety of topics, to share challenges and frustrations, yet ALSO....proven and potential SOLUTIONS to overcome roadblocks associated with being <i>"in transition"</i> A 100% CONFIDENTIAL, PRIVATE & SECRET SOCIETY! - <i>yet definitely with a very uplifting, positive, and encouraging community vibe!</i>	- Resume writing do and don'ts - Job interviewing best practices - Amplifying your professional social media personal brand & footprint - Professional networking best practices and boosting your personal brand exposure & opportunities
EXECUTIVE PLACEMENT, RECRUITERS & CAREER COACHING	CONSULTING OR STARTING YOUR OWN BUSINESS WORKSHOPS, VIDEO TUTORIALS, RESOURCES & INSIGHTS	SHINE BY SHARING YOUR INSIGHTS & EXPERTISE WITH YOUR FELLOW IA FORUM COMMUNITY COLLEAGUES	1:1 INTRODUCTIONS TO MEMBERS THAT MAY NEED YOUR EXCEPTIONAL TALENTS!
- A wide array of resources to align you with Executive Placement, Recruiters & Career Coaching experts - Workshops developed & facilitated by professionals with the above expertise	"How To" guides on best practices to start your own consulting or small business - U.S. Federal & State Government resources, tools, programs & insights to assist you with your next chapter - Workshops developed & facilitated by professionals with the above expertise - Video tutorials on how to get started and succeed with your next chapter	Often one of the best ways to let your given professional community, and/or potential employers or clients learn about your exceptional skill sets & talents is to share your insights by way of being an event speaker or contributing special content they can consume. By doing so, you'll increase your exposure, which certainly is one of TOP job search best practices!	If you're HIRING or OPEN TO WORK, please let Jules know, as she's the <i>"Queen of Introductions"</i> and she would be more than happy to do a 1:1 introduction, if x member(s) are open to being introduced to each other.

BESPOKE CORPORATE EVENTS



As an additional membership benefit, the IA FORUM offers its event planning services to our members' organizations. Our dedicated team specializes in crafting events that are not only seamless and professionally executed but also thoughtfully designed to align with your organization's objectives.

Here are just a few examples of the events we can help your organization plan, manage, and facilitate.

- Conferences & Summits - *virtual and in-person*
- Workshops & Training Sessions - *virtual and in-person*
- Webinars
- Award Ceremonies & Recognition Events - *virtual and in-person*
- Networking Events - *virtual and in-person*
- Executive Off-Sites & Retreats
- Off-Site & On-Site Team Building Events and Retreats
- Holiday Parties

Whether you're looking to host a memorable company event, motivate your team, or celebrate success, we're here to make it happen. With our wealth of experience, we deliver results that exceed expectations. To learn more, contact us at info@theiaforum.com - *additional costs apply*.

We look forward to helping your organization create unforgettable moments.



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IA FORUM
Collectively Driving Digital Transformation Excellence

EVENTS

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



- ❖ INSIGHTS SHARING & COLLABORATION
- ❖ TRAINING & CONTINUED EDUCATION
- ❖ NETWORKING & SPECIAL EVENTS



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

Nearly every month there are 10 virtual events and 1 - 3 in-person networking events members can attend. **All non-discussion based VIRTUAL events have an extra 30-minutes built into them**, to provide members with enhanced **NETWORKING** opportunities. The event’s extra **NETWORKING** time is hosted and facilitated by the IA FORUM.

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INSIGHTS SHARING & COLLABORATION	TRAINING & CONTINUED EDUCATION	NETWORKING EVENTS	SPECIAL EVENTS
▪ Roundtable Discussions ▪ Panel Discussions ▪ Use Case Presentations ▪ Lectures ▪ Thought Leadership Interviews	▪ Workshops ▪ IA Training Courses ▪ Ivy League Technology Senior Management Educational Courses	▪ Luncheons ▪ Dinner Parties ▪ Cocktail Receptions ▪ Networking Power Hours ▪ Networking Huddles Virtual + Event Locations NYC Chicago San Francisco Dallas Atlanta Boston DC Charlotte Toronto	▪ Destination Retreats ▪ Bespoke Events Destination Retreats Hawaii, Bahamas, Napa Valley, Scottsdale, Barcelona, Venice, etc.

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



NETWORKING EVENTS



Throughout the year, the IA FORUM hosts over 20+ exclusive luncheons, dinner parties, and cocktail receptions across the U.S. These networking events are designed to connect members with peers that share similar expertise and interests, fostering meaningful discussions on topics that matter most to them, while providing opportunities to build new relationships and strengthen existing ones.

Additionally, every month there are several virtual networking events, such as Networking Power Hours and Networking Huddles. **Furthermore, all non-discussion based VIRTUAL events have an extra 30-minutes built into them**, to provide members with enhanced **NETWORKING** opportunities. The event’s extra **NETWORKING** time is hosted and facilitated by the IA FORUM.

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LUNCHEONS	DINNER PARTIES	COCKTAIL RECEPTIONS	VIRTUAL NETWORKING POWER HOURS & HUDDLES
▪ 1 1/2 hours ▪ Locations vary throughout the year ▪ 10+ per year ▪ 10 - 30 attendees <i>* Reserved for Core and "C-Suite Council" members - and their VIP Guests - additional costs apply.</i>	▪ 3-hours ▪ Locations vary throughout the year ▪ 10+ per year ▪ 10 - 30 attendees <i>* Reserved for Core and "C-Suite Council" members - and their VIP Guests - additional costs apply.</i>	▪ 3-hours ▪ Locations vary throughout the year ▪ 5+ per year ▪ 30 - 60 attendees <i>* Open to Core, Team, and "C-Suite Council" members - and their VIP Guests - additional costs apply.</i>	▪ 1-hour ▪ Relaxed and casual get togethers ▪ 10 - 30 attendees <i>* Open to Core, Team, and "C-Suite Council" members.</i>

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Each retreat spans 3 - 4 days and offers a carefully curated itinerary to ensure you leave feeling refreshed, inspired, and better connected with your fellow IA FORUM members.

Destinations include such locations as Hawaii; Scottsdale; Napa Valley, Venice, Italy & Many Other U.S. & International Destinations.

Retreats include, yet will not be limited to:

- **Mini-Conference Programming:** Attend thought-provoking mini-conference sessions designed to spark ideas and drive innovation.
- **Exclusive Networking Opportunities:** Connect with your like-minded IA FORUM members in relaxed, intimate settings, fostering genuine and lasting relationships.
- **Exciting Activities & Adventures:** Experience local culture through curated activities, guided excursions, and much more.
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These retreats are more than just events - they're a chance to gain fresh perspectives on industry challenges and opportunities, build a stronger professional network, reignite your creativity and passion in inspiring settings, and make memories that last a lifetime while advancing your industry knowledge-base and skill sets.

Please Note...

These retreats are open to all Core members, yet Team members do not qualify to attend. There's also additional retreats throughout the year, specifically designed for our "C-Suite Council" members - additional costs apply.

Be part of shared experiences that create enhanced and long-lasting community bonds and alliances.



BESPOKE CORPORATE EVENTS



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- Award Ceremonies & Recognition Events - *virtual and in-person*
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- ❖ INSIGHTS LIBRARY & EVENT VIDEOS HUB
- ❖ IA FORUM YOUTUBE CHANNEL & IA FORUM MAGAZINE
- ❖ ADVISORY BOARD INSIGHTS FORUM
- ❖ COMMUNITY DISCUSSION FORUM



The IA FORUM offers a wide array of insights available anytime, anywhere. Members can access these valuable resources through their IA FORUM members only website account.

INSIGHTS LIBRARY	EVENT VIDEOS HUB	IA FORUM YOUTUBE CHANNEL
A private collection of IA FORUM members' Use Case Presentations, past event presentations, and Digital Thought Leadership Interviews, along with publicly available industry white papers and reports. <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>	A private video collection of past IA FORUM Panel Discussions, Use Case Presentations, Lectures, and Thought Leadership Interviews. <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>	The IA FORUM YouTube Channel consists of publicly available videos on topics that matter most to our members. The channel has 12 playlists & nearly 1,000 videos - and is updated with 50 - 100 new videos weekly. The channel includes videos from recent thought leadership interviews & event keynote presentations, podcasts, event conference sessions, virtual events, TV news reports and lectures from renown universities and experts in the IA, AI, automation, technology, and business & digital transformation space. <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>
IA FORUM MAGAZINE	ADVISORY BOARD INSIGHTS FORUM	COMMUNITY DISCUSSION FORUM
The IA FORUM Magazine is an exclusive digital publication designed specifically for IA FORUM members. The magazine is powered by an AI-driven system that pulls thousands of news articles and content from the world's top publications and media outlets. In turn, the IA FORUM curates IA, AI, automation, technology, and business & digital transformation articles and content that directly reflects the stories that matter most to our members. <i>* Reserved for Core, Team, and "C-Suite Council" members.</i>	▪ An online discussion forum that provides unbiased, end-user perspectives and in-depth analysis on the topics that matter most to our members ▪ Topic examination of a variety of IA, AI, automation, technology, and business & digital transformation topics, stories, and much more ▪ Consists of IA FORUM Advisory Board members <i>* Reserved for Core and "C-Suite Council" members.</i>	▪ An online peer-to-peer interactive discussion forum where members can share their unbiased, end-user thoughts on the topics that matter most to them and the broader IA FORUM community ▪ Consists of Core and "C-Suite Council" members <i>* Reserved for Core and "C-Suite Council" members.</i>

Knowledge is the key that unlocks potential and drives progress.

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JOIN

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- ❖ MEMBERSHIP CRITERIA
- ❖ INDIVIDUAL MEMBERSHIP
- ❖ CORPORATE; GOVERNMENT & ACADEMIA, AND “C-SUITE COUNCIL” MEMBERSHIP
- ❖ VENDOR ENGAGEMENT POLICIES & POLICY CENTER

MEMBERSHIP CRITERIA



To become an IA FORUM member, you must be a C-Suite or senior-level executive within the fields of IA, AI, automation, technology, CoE, GBS/shared services, process improvement, business & digital transformation - or a functional area C-Suite or leader leveraging automation to enhance operations, and/or....a practitioner, scientist, subject matter expert, thought leader, author, academic, or a top voice in the space.

Membership Application Process:

There are several ways to become an IA FORUM member, including the below options:

- Invited by Jules or another member of the IA FORUM team.
- Nominated or referred by an IA FORUM Advisory Board member or a current member that's your internal or external colleague.
- Applying directly through the IA FORUM website.

To get a sense if you align with the IA FORUM community, below is a snapshot of our members' job titles and functional areas.

JOB TITLES	FUNCTIONAL AREAS & INDUSTRIES
▪ 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 ▪ Business & Digital Transformation ▪ GBS (global business services) & Shared Services ▪ C-Suite ▪ Technology, IT, CoE (Center of Excellence), Data & Cybersecurity, Governance ▪ Finance ▪ Operations & Process Improvement ▪ 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 <i>"Intelligence Community"</i> ▪ <i>And Much More!</i>

INDIVIDUAL MEMBERSHIP



If you qualify for membership and want to join the IA FORUM on your own, rather than having your company sponsor your membership, you should select an Individual membership.

** Individual Core Plus membership plans can be paid via a PERSONAL credit card.*

1 Core seat CORE PLUS

Includes:

- Core Community - Roundtable Discussions & Special Content
- Up to 5 Focus & 5 Specialty Communities - Roundtable Discussions & Special Content
- Panel Discussions, Use Case Presentations, Lectures & Thought Leadership Interviews
- Workshops
- IA Training Courses – *additional costs apply.*
- **ROCK STAR Insights**
- Ivy League Technology Senior Management Educational Courses - *additional costs apply.*
- Luncheons, Dinner Parties & Cocktail Receptions - *additional costs apply.*
- Virtual Networking Events
- Destination Retreats - *additional costs apply.*
- Bespoke Events - *additional costs apply.*
- **Advisory Board Insights Forum**
- **Community Discussion Forum**
- Insights Library & Event Videos Hub
- IA FORUM YouTube Channel & IA FORUM Magazine
- “In Transition” Community Support Programs
- IA FORUM Insider’s Job Board
- **Peer Partnerships, 2 per year**
- **Ten (10) FREE Event VIP “Entry” Guest Passes - \$25.00 value per pass.**

Launch Promotion

Expires April 1, 2025

\$600 USD / 1-year

Standard Membership

\$1,200 USD / 1-year

** Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.*

Invest in yourself, invest in your career.

CORPORATE MEMBERSHIP



If you, and/or your team and colleagues qualify for membership and want to join the IA FORUM, you should select a Corporate membership.

** Corporate membership plans can be paid via a PERSONAL or business credit card.*

1 Core seat CORE	3 Core seats CORE ENTERPRISE
Includes: - Core Community - Roundtable Discussions & Special Content - Up to 5 Focus & 5 Specialty Communities - Roundtable Discussions & Special Content - Panel Discussions, Use Case Presentations, Lectures & Thought Leadership Interviews - Workshops - IA Training Courses - <i>additional costs apply.</i> ROCK STAR Insights - Ivy League Technology Senior Management Educational Courses - <i>additional costs apply.</i> - Luncheons, Dinner Parties & Cocktail Receptions - <i>additional costs apply.</i> Virtual Networking Events Destination Retreats - <i>additional costs apply.</i> Bespoke Events - <i>additional costs apply.</i> Advisory Board Insights Forum & Community Discussion Forum - Insights Library & Event Videos Hub - IA FORUM YouTube Channel & IA FORUM Magazine Technology Market Insights & Reports "In Transition" Community Support Programs - IA FORUM Insider's Job Board Peer Partnerships, 2 per year Ten (10) FREE Event VIP "Entry" Guest Passes - \$25.00 value per pass. Launch Promotion <i>Expires April 1, 2025</i> \$900 USD / 1-year *** Standard Membership \$1,450 USD / 1-year <i>* Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.</i>	Includes: - Core Community - Roundtable Discussions & Special Content, per Core member - Up to 5 Focus & 5 Specialty Communities - Roundtable Discussions & Special Content, per Core member - Panel Discussions, Use Case Presentations, Lectures & Thought Leadership Interviews - Workshops - IA Training Courses - <i>additional costs apply.</i> ROCK STAR Insights - Ivy League Technology Senior Management Educational Courses - <i>additional costs apply.</i> - Luncheons, Dinner Parties & Cocktail Receptions - <i>additional costs apply.</i> Virtual Networking Events Destination Retreats - <i>additional costs apply.</i> Bespoke Events - <i>additional costs apply.</i> Advisory Board Insights Forum & Community Discussion Forum - Insights Library & Event Videos Hub - IA FORUM YouTube Channel & IA FORUM Magazine Technology Market Insights & Reports "In Transition" Community Support Programs - IA FORUM Insider's Job Board Peer Partnerships, 2 per year, per Core Member Thirty (30) FREE Event VIP "Entry" Guest Passes - \$25.00 value per pass. Launch Promotion <i>Expires April 1, 2025</i> \$2,700 USD / 1-year *** Standard Membership \$4,350 USD / 1-year <i>* Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.</i>

Invest in yourself, invest in your team.

CORPORATE MEMBERSHIP



If you, and/or your team and colleagues qualify for membership and want to join the IA FORUM, you should select a Corporate membership.

** Corporate membership plans can be paid via a PERSONAL or business credit card.*

1 Core + 2 Team seats CORE + TEAM	ADDITIONAL INFORMATION
Core Membership Includes: ▪ Core Community - Roundtable Discussions & Special Content ▪ Up to 5 Focus & 5 Specialty Communities - Roundtable Discussions & Special Content ▪ Panel Discussions, Use Case Presentations, Lectures & Thought Leadership Interviews ▪ Workshops ▪ ROCK STAR Insights ▪ IA Training Courses - <i>additional costs apply.</i> ▪ Ivy League Technology Senior Management Educational Courses - <i>additional costs apply.</i> ▪ Luncheons, Dinner Parties & Cocktail Receptions - <i>additional costs apply.</i> ▪ Virtual Networking Events ▪ Destination Retreats - <i>additional costs apply.</i> ▪ Bespoke Events - <i>additional costs apply.</i> ▪ Advisory Board Insights Forum ▪ Community Discussion Forum ▪ Insights Library & Event Videos Hub ▪ IA FORUM YouTube Channel ▪ IA FORUM Magazine ▪ Technology Market Insights & Trends Quarterly Reports ▪ <i>"In Transition"</i> Community Support Programs ▪ IA FORUM Insider's Job Board ▪ Peer Partnerships, 2 per year ▪ Twenty (20) FREE Event VIP "Entry" Guest Passes - \$25.00 value per pass.	Team Membership Includes: ▪ Team Community - Roundtable Discussions & Special Content ▪ Panel Discussions, Use Case Presentations, Lectures & Thought Leadership Interviews ▪ Workshops ▪ IA Training Courses - <i>additional costs apply.</i> ▪ Virtual Networking Events ▪ Cocktail Receptions - <i>additional costs apply.</i> ▪ Insights Library ▪ Event Videos Hub ▪ IA FORUM YouTube Channel ▪ IA FORUM Magazine ▪ Mentorships, 2 per year, per Team member Launch Promotion <i>Expires April 1, 2025</i> \$2,300 USD / 1-year *** Standard Membership \$2,250 USD / 1-year <i>* Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.</i> Additional "Team" Seats: 1 seat: \$500 USD 2 seats: \$1,000 USD 3 seats: \$1,500 USD 4 seats: \$2,000 USD 5 seats: \$2,500 USD

Invest in yourself, invest in your team.

"C-SUITE COUNCIL" MEMBERSHIP



The IA FORUM's "C-Suite Council" is an exclusive membership designed for CEOs, CFOs, COOs, CPOs, CMOs, CHROs, CIOs, CTOs, CISOs, CDOs, CAIOs, CXOs, CROs, CAOs, and alike executives, providing them with exclusive programs that enable them to benchmark, collaborate, and network with their direct and enterprise-wide C-Suite peers.

Membership Criteria & Application Process

- You must be a C-Suite to qualify (job title must include "Chief")
- You must be invited by Jules or sent a membership invitation from an IA FORUM Advisory Board or a current member.
- Vendors can NOT apply for membership, as vendors are excluded from participating in IA FORUM community activities.

** Membership plans can be paid via a PERSONAL or business credit card.*

1 Core seat "C-SUITE COUNCIL"

ADDITIONAL INFORMATION

Core Membership Includes:

- Core Community - Roundtable Discussions & Special Content
- Up to 5 Focus & 5 Specialty Communities - Roundtable Discussions & Special Content
- Panel Discussions, Use Case Presentations, Lectures & Thought Leadership Interviews
- Workshops
- **ROCK STAR Insights**
- IA Training Courses - *additional costs apply.*
- Ivy League Technology Senior Management Educational Courses - *additional costs apply.*
- Luncheons, Dinner Parties & Cocktail Receptions - *additional costs apply.*
- **Virtual Networking Events**
- **Destination Retreats** - *additional costs apply.*
- **Bespoke Events** - *additional costs apply.*
- **Advisory Board Insights Forum**
- **Community Discussion Forum**
- Insights Library & Event Videos Hub
- IA FORUM YouTube Channel
- IA FORUM Magazine
- **Technology Market Insights & Trends Quarterly Reports**
- "In Transition" Community Support Programs
- IA FORUM Insider's Job Board
- **Peer Partnerships, 2 per year**
- **Thirty (30) FREE Event VIP "Entry" Guest Passes** - *\$25.00 value per pass.*

Also Includes:

- **Keynote C-Suite Presentations & Workshops** - *additional costs apply.*
- **"C-Suite Council" Destination Retreats** - *additional costs apply.*
- **"C-Suite Council" Challenges & Solutions Workshops**
- **"C-Suite Council" Dinner & Cocktail Parties** - *additional costs apply.*
- **"C-Suite Council" Use Case Presentations**
- **"C-Suite Council" Roundtable Discussions**
- **"C-Suite Council" 1:1 Introductions**
- **"C-Suite Council" Discussion Forum**

Launch Promotion

Expiring soon!

\$1,750 USD / 1-year

Standard Membership

\$3,750 USD / 1-year

** Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.*

Join the IA FORUM C-Suite Council and be part of an elite network of executive leaders shaping enterprise-wide business and digital transformation.

GOVERNMENT, ACADEMIA, NGO & RESEARCH LABS MEMBERSHIP



The IA FORUM understands that government, academia, NGO, and research labs professionals often face budgetary constraints. That said, we offer attractive discounted membership rates for these professionals, to ensure financial limitations don't prevent them from being part of the IA FORUM community.

Who Qualifies?

- **U.S. Federal Government Agencies & State Dept of x:** Dept of x, DoD, HHS, NASA, IRS, FEMA, New York State Dept of x, and alike.
- **U.S. Federal Government & International Law Enforcement Agencies and the "Intelligence Community":** FBI, CIA, DoJ, Secret Service, DHS, INTERPOL, Europol, NSA, and alike.
- **Academia:** Private and state universities, government & non-profit research agencies, labs, hubs, and incubators.
- **NGOs:** Non-profits and charity groups.
- **Research Labs, Incubators & Hubs:** A wide array of organizations focus on the study and advancement of AI and other technologies.
- **Policymakers:** U.S. federal and state government agencies, international agencies, and non-profit think tanks, legislative bodies, and AI policy think tanks.

Membership Criteria & Application Process

- Only the above professionals qualify for these greatly discounted memberships.
- You must be invited by Jules or another IA FORUM team member - or invited by an IA FORUM Advisory Board or a current member.

** Membership plans can be paid via a PERSONAL or business credit card.*

1 Core seat CORE	1 Core + 2 Team seats CORE + TEAM	3 Core seats CORE GROUP	1 "C-Suite Council" seat "C-SUITE COUNCIL"
Includes: ▪ Same benefits as the Corporate Core plan. Standard Membership \$400 USD / 1-year <i>* Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.</i>	Includes: ▪ Same benefits as the Corporate Core + Team plan. Standard Membership \$800 USD / 1-year <i>* Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.</i>	Includes: ▪ Same benefits as the Corporate Enterprise plan. Standard Membership \$1,200 USD / 1-year <i>* Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.</i>	Includes: ▪ Same benefits as the "C-Suite Council" plan. C-Suites, Secretaries, Deputies, Heads, and Executive Directors within the U.S. federal government and international government agencies, research labs, think tanks, policy councils, law enforcement, the "intelligence community", NGOs, non-profits, and alike qualify for this membership plan. Standard Membership \$400 USD / 1-year <i>* Must qualify to apply. 12-months plan, payable upon membership activation, no auto-renewal, non-refundable, plus NYS 8.875% sales tax.</i>

We value your participation in the IA FORUM community.

VENDOR ENGAGEMENT POLICIES



Our Approach to Vendor Engagement

At the IA FORUM, we are deeply committed to fostering a highly valuable peer-to-peer community, along with programs and content that are always end-user-centric and designed to help our members and their organization achieve IA, AI, and digital transformation excellence. To uphold this commitment, we maintain a vendor-free zone and enforce strict content neutrality and integrity protocols that all members and the IA FORUM must adhere to.

However, we also recognize its essential for our members to be informed about the vendor landscape in their particular focus areas. By doing so, this ensures they can stay aware of the tools available in the marketplace, select the best solutions for their initiatives, and collaborate with their peers to troubleshoot any roadblocks they may encounter with their current solution providers and vendors.

That said, the IA FORUM and its members must adhere to the below policies.

- **Content Neutrality & Integrity:** We maintain rigorous protocols to ensure our community and programs remain free from commercial influence. Vendors are excluded from community discussions, and members are expected to uphold Charter House Rules and these values, by contributing without bias or promotional intent.
- **Confidentiality & Data Security:** The IA FORUM has strict standards to protect our members' contact information and data. Under no uncertain terms do we share our members' information with solution providers or vendors that may participate or engage with the IA FORUM in some way. Or in other words, they are NEVER given access to our members' names, emails, phone #s, or a list of our members that attended their event, clicked on their content, ad spots, or directory listing.
- **Vendor-Free Community:** Our community is a vendor-free zone where sales pitches, endorsements, and self-promotion are strictly prohibited. Violations may result in immediate membership termination. However, select vendors who exemplify thought leadership, high ethical standards, and practitioner-centric values may be invited to contribute without promotional bias, adhering to the IA FORUM's strict no sales pitches/endorsement and self-promotion policies.
- **VERY STRICT & HIGHLY REGULATED VENDOR Exceptions/Expanded Policy:** From time-to-time we allow solution providers and vendors to speak on IA FORUM events, and/or....feature their organization via the IA FORUM Magazine, IA FORUM YouTube Channel, or Vendor Directory on the website - as content placement or ad spots. For a very select few, we allow them to be members, yet with the understanding they must adhere to our very strict policy of **NO VENDOR SALES PITCHES/ENDORSEMENT OR SELF-PROMOTION are permitted at any time, not in any way, shape, or form.** In these cases, the same member confidentiality policies apply and are highly regulated by the IA FORUM.

Your privacy and data security are paramount to us, ensuring you can fully engage with confidence in our community.





The IA FORUM prides itself on creating supportive and dynamic virtual, digital, and in-person environments where all members can thrive and reach their full potential. We maintain robust standards to ensure compliance with industry protocols for confidentiality, data privacy, and security.

To become an IA FORUM member, the following policies below must be reviewed and agreed upon prior to joining the community: Mission, Core Values & Policies; Refund Policy; Terms & Conditions; Privacy Policy; Cookies Policy; Acceptance of Use Policy; and Disclaimer

Additionally, please note that the IA FORUM and its members must adhere to the below policies.

- **Content Neutrality & Integrity:** We maintain rigorous protocols to ensure our community and programs remain free from commercial influence. Vendors are excluded from community discussions, and members are expected to uphold Charter House Rules and these values, by contributing without bias or promotional intent.
- **Confidentiality & Data Security:** The IA FORUM has strict standards to protect our members' contact information and data. Under no uncertain terms do we share our members' information with solution providers or vendors that may participate or engage with the IA FORUM in some way. Or in other words, they are NEVER given access to our members' names, emails, phone #s, or a list of our members that attended their event, clicked on their content, ad spots, or directory listing.
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AN EXCLUSIVE AND VIBRANT
COMMUNITY FOR IA, AI,
AUTOMATION, TECHNOLOGY,
AND BUSINESS & DIGITAL
TRANSFORMATION LEADERS



IA FORUM
Collectively Driving Digital Transformation Excellence

CONTACT

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



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