

IA FORUM

Collectively Driving Digital Transformation Excellence

MARCH & APRIL 2025

AGENDA

www.theiaforum.com

MEMBER SPEAKERS

- **Anurag Voleti**, Former Chief Data Officer, **BLUECROSS BLUESHIELD ASSOCIATION** & Chief AI & Product Officer, **STEALTH AI STARTUP**
- **Balaji Dhamodharan**, Global Software Analytics Leader, Artificial Intelligence & Machine Learning, **AMD**
- **Claire Grosjean**, Senior Director, Business Process Management, **TECHNOLOGY CREDIT UNION**
- **Curt Burghart**, Vice President, People Delivery, **UNUM**
- **David Weild IV**, Chairman & Chief Executive Officer, **WEILD & CO.** & Former Vice Chairman & Executive Vice President, **NASDAQ**
- **Deji Adedayo**, Intelligent Automation & Product Owner - North America, **GORDON FOOD SERVICE**
- **Doug Shannon**, Global Intelligent Automation & GenAI Thought Leader & Global Intelligent Automation Manager, **PSI CRO AG**
- **Duffie Brunson**, Research Sabbatical & Director, Enterprise Data Oversight, **FANNIE MAE**
- **Erum Manzoor**, Senior Vice President, Digital & Cloud Technology, **CITI**
- **Gaurav Basra**, Chief Technology Officer, **SSC.AI**
- **Henry Lyles**, Director, Global Technology & Intelligent Automation Solutions CoE, **MCDONALD'S**
- **Ian Barkin**, Intelligent Automation Thought Leader, **2B VENTURES** & Author, "INTELLIGENT AUTOMATION"
- **Jeff Machols**, Vice President, Head of Continuous Improvement Sustainability, **NEW YORK LIFE COMPANY**
- **Jennifer L. Mezzio**, Global HR Data Officer, **FIRST CITIZENS BANK**
- **Jules Miller**, IA Insights & Community Liaison Officer, **IA FORUM**
- **Kartik Kinhal**, Director, Engineering, Automation & Data Analytics, **APPLIED MATERIALS**
- **Marty Samadder**, Cloud CoE, FinOps & Enterprise Architecture Leader, **NOVELIS**
- **Nitin Agarwal**, Director, IT Supply Chain Solutions, **MCKESSON**
- **Ramnath Natarajan**, Director, Intelligent Automation & Enterprise Integration CoE, **JOHNSON CONTROLS**
- **Rex Patel**, Global Automation Generative AI Architect Leader, **MATTHEWS INTERNATIONAL**
- **Robert Towle**, Author, "DON'T BE DUMB" & Senior Advisor, **U.S. FEDERAL GOVERNMENT**
- **Ryan Davis**, Head of Category Management, **USAA**
- **Ryan Davis**, Senior Director of Process Improvement & Intelligent Automation, **ARVEST BANK**
- **Santhosh Vijayabaskar**, Director, Intelligent Automation & Process Excellence, **FIDELITY INVESTMENTS**
- **Stephen Harris**, Former Corporate Vice President, Global Head of Data Science & AI Growth Analytics, **MICROSOFT**
- **Sudhanshu Duggal**, Former Chief Information Officer & Regional Data Digital Strategy & AMEA Digital Experiences Leader, **PROCTER & GAMBLE**
- **Suzanne LaLena**, Senior Vice President, Automation Engineering, **BNY MELLON**
- **Swati Gupta**, Enterprise AI Automation Lead, **LIBERTY BANK**
- **Vipin Jain**, Director of Automation CoE & Customer Success & Innovation, **OMERS**

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



EVENTS CALENDAR

MARCH

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

APRIL

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

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



AGENDA: MARCH

Monday, 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*

Thursday, March 6 | 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 (AI) is reshaping industries, enterprises face a critical imperative: adapt strategically or risk obsolescence. In this use case presentation, we will explore a pragmatic roadmap for C-Suite and 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, and predictive analytics - as well as real-world use cases that will illustrate how AI-driven decision-making unlocks competitive advantages, from cost reduction to hyper-personalized engagement.

In this session, 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*

Tuesday, 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*

Wednesday, 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*

Friday, March 14 | 6:00pm - 8:00pm local time | Atlanta

NETWORKING DINNER PARTY

Details soon to come!

Tuesday, 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 Automation Generative AI Architect Leader, MATTHEWS INTERNATIONAL*

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

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

WORKSHOP: LEVERAGING CUSTOMER EXPERIENCE JOURNEY MAPPING TO FORMULATE A LEAN PRODUCT ROADMAP FOR AI & 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 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 will 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 will 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*

Friday, March 21 | 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*

Monday, 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 session will focus on managing risks, streamlining processes, and enhancing decision-making with robust data governance practices.

In this session, 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
- Best practices for aligning data oversight with business outcomes

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

Tuesday, 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*

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

Wednesday, 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. Whether you're a developer, practitioner, or business leader, this session will equip you with the knowledge and tools to navigate the future of AI-driven automation.

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*

AGENDA: APRIL

Tuesday, 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*

Wednesday, 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 session 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*

Friday, 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, and competitive advantage. However, the challenge lies in integrating analytics seamlessly across diverse enterprise teams, ensuring data quality, and translating insights into real business value. This session will 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*

Moderator: **Doug Shannon**, *Global Intelligent Automation & GenAI Thought Leader & Global Intelligent Automation Manager, PSI CRO AG*

Monday, 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*

Wednesday, 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. Yet, 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**

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

PANEL DISCUSSION & NETWORKING HUDDLE: NAVIGATING ARTIFICIAL INTELLIGENCE AND 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"**

Thursday, 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**

Tuesday, 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**

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

Wednesday, 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 workshop, we will 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, PSI CRO AG*

Friday, April 25 | 6:00pm - 8:00pm local time | New York City

NETWORKING DINNER PARTY

Details soon to come!

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

