



**FORRESTER**

# CX Forum West

**San Francisco**

**June 29, 2026 – June 30, 2026**

Agenda downloaded: June 09, 2026 06:07:00 AM ET

Monday, Jun 29

1:00 pm – 6:00 pm PDT	<b>Registration</b>
2:00 pm – 3:00 pm PDT	<b>Workshop: Catalyze Agentic Commerce — How To Move From FOMO To Focus</b>  Speakers: Chuck Gahun, Principal Analyst, Forrester
2:00 pm – 3:00 pm PDT	<b>Deep Dive: Improve Your People’s AI And Innovation Readiness With Forrester’s AIQ</b>  Speakers: James L. McQuivey, PhD, VP, Research Director, Forrester
2:00 pm – 4:30 pm PDT	<b>CX Certification: Advance From Journey Mapping To Journey Management</b>  Speakers: Su Doyle, Principal Analyst, Forrester Jenna Wohead, Director, Product Management, Forrester
2:00 pm – 5:50 pm PDT	<b>The Total Forrester Experience: Executive Challenge (Retail Scenario)   Group 1 - 4</b>  Speakers: Angelina Gennis, Principal Analyst, Forrester  <b>Group 1: 2:00 pm - 2:50 pm</b>  <b>Group 2: 3:00 pm - 3:50 pm</b>  <b>Group 3: 4:00 pm - 4:50 pm</b>  <b>Group 4: 5:00 pm - 5:50 pm</b>
3:00 pm – 3:30 pm PDT	<b>Networking Break</b>
3:30 pm – 4:30 pm PDT	<b>Workshop: Ensure Your Consumer Personalization Vision Is 20/20</b>  Speakers: Jessica Liu, Principal Analyst, Forrester
3:30 pm – 4:30 pm PDT	<b>Workshop: Leveraging Key Drivers Of Total Experience: US Health Insurers, 2026</b>  Speakers: Judy Weader, Principal Analyst, Forrester

**Monday, Jun 29**

3:30 pm – 4:30 pm PDT	<p><b>Deep Dive: Be A Trusted Human Leader In An AI World</b></p> <p>Speakers: Katy Tynan, VP, Principal Analyst, Forrester Jonathan Roberts, Vice President of Strategy, Together Credit Union</p>
4:45 pm – 5:15 pm PDT	<p><b>Case Study Sessions</b></p> <p><b>Clozd: Uncover The “Why” Behind Customer Decisions</b> Speakers: Brady Tengberg, Head of Client Success, Clozd</p> <p><b>TheyDo: From Journeys To Decision Context At Autodesk</b> Speakers: Florian Vollmer, Director of Experience Insights, Autodesk</p>
5:20 pm – 5:50 pm PDT	<p><b>Case Study Sessions</b></p> <p><b>JourneyTrack: Governance First: Scaling Journey Management With AI</b> Speakers: Strat Parrott, VP, Head of Experience, CX &amp; UX, First Horizon Bank Ania Rodriguez, Founder &amp; CEO, JourneyTrack Eugenio Santiago, President, Key Lime Interactive</p> <p><b>Kore.ai: Fit for Failure: A Selection Framework For The Agentic Use Cases Built To Win</b> Speakers: Cathal McCarthy, Chief Strategy Officer (CSO), Kore.ai</p>
5:50 pm – 7:00 pm PDT	<p><b>Welcome Reception</b></p>
6:00 pm – 8:30 pm PDT	<p><b>Executive Leadership Exchange (Invite-Only)   Flavors of the Bay: From Marketplace to Master Chocolatier</b></p> <p>Speakers: Ron Rogowski, VP, Executive Partner, Forrester Jen Sanning, Executive Partner, Forrester</p>

**Tuesday, Jun 30**

8:00 am – 8:50 am PDT	<p><b>The Total Forrester Experience: Executive Challenge (FI Services Scenario)   Group 5</b></p> <p><b>Group 5: 8:00 am - 8:50 am</b></p>
8:15 am – 9:25 am PDT	<p><b>Executive Leadership Exchange Breakfast (Invite-Only): Peer-Led Executive Tables</b></p> <p>Speakers: Ron Rogowski, VP, Executive Partner, Forrester Jen Sanning, Executive Partner, Forrester</p>

**Tuesday, Jun 30**

8:15 am – 9:25 am PDT	<p><b>Forrester Women's Leadership Breakfast</b></p> <p>Speakers: Emily Collins, VP, Research Director, Forrester Katy Tynan, VP, Principal Analyst, Forrester</p>
8:30 am – 9:30 am PDT	<p><b>Networking Breakfast, featuring Birds of a Feather Tables</b></p>
8:30 am – 9:15 am PDT	<p><b>SAS Breakfast Case Study: Stop Chasing the Edges — The MarTech Middle Is the New Frontier</b></p> <p>Speakers: Kate Parker, Head of Customer Intelligence, Americas, SAS</p>
9:30 am – 9:45 am PDT	<p><b>Welcome Remarks</b></p> <p>Speakers: Sharyn Leaver, Chief Research Officer, Forrester Rick Parrish, VP, Research Director, Forrester</p>
9:45 am – 10:10 am PDT	<p><b>Keynote: Maximize Your Total Experience With Forrester's EX Index</b></p> <p>Speakers: James L. McQuivey, PhD, VP, Research Director, Forrester</p>
10:10 am – 10:30 am PDT	<p><b>Keynote: Forrester's Total Experience Honor: Celebrating North America's Best-In-Class</b></p> <p>Speakers: Keith Johnston, VP, Group Director, Forrester Mack McGee, Chief Marketing Officer, CareFirst BlueCross BlueShield Greg Barber, Director, Experience &amp; Market Research   Strategic Growth, CareFirst Blue Cross Blue Shield</p>
10:35 am – 11:05 am PDT	<p><b>Coffee Break &amp; Networking</b></p>
10:40 am – 11:00 am PDT	<p><b>Get The Most From Forrester</b></p> <p>Speakers: Jenna Wohead, Director, Product Management, Forrester Emily Collins, VP, Research Director, Forrester Greg Barber, Director, Experience &amp; Market Research   Strategic Growth, CareFirst Blue Cross Blue Shield</p>

Tuesday, Jun 30

<p>10:40 am – 11:05 am PDT</p>	<p><b>Analyst-Led Roundtables</b></p> <p><b>Differentiated B2B CX in an AI era</b> Speakers: Su Doyle, Principal Analyst, Forrester</p> <p><b>Expanding The CX Measurement Aperture</b> Speakers: Rich Saunders, Senior Analyst, Forrester</p> <p><b>Agentic AI And The Future of Customer Service</b> Speakers: Max Ball, Principal Analyst, Forrester</p> <p><b>The Principles And Practice Of AI Implementation</b> Speakers: Emily Collins, VP, Research Director, Forrester Jessica Liu, Principal Analyst, Forrester</p>									
<p>10:45 am – 12:45 pm PDT</p>	<p><b>The Total Forrester Experience: Executive Challenge (FI Services Scenario)   Group 6 &amp; 7</b></p> <p>Speakers: Angelina Gennis, Principal Analyst, Forrester</p> <p><b>Group 6: 10:45 am - 11:35 am (Reserved for ELE)</b></p> <p><b>Group 7: 11:45 am - 12:35 pm</b></p>									
<p>11:05 am – 11:35 am PDT</p>	<p><b>Breakout Sessions</b></p> <table border="1" data-bbox="315 1007 2199 1318"> <tr> <td data-bbox="315 1007 1256 1062"> <p><b>MAKE YOUR STRATEGY UNMISTAKABLE</b></p> </td> <td data-bbox="1256 1007 2199 1062"> <p><b>OPERATE ON A FOUNDATION AI CAN'T BUILD</b></p> </td> </tr> <tr> <td data-bbox="315 1062 1256 1142"> <p><b>Drive Growth With An AI-Powered Total Experience</b> Speakers: Dipanjan Chatterjee, Vice President, Principal Analyst, Forrester</p> </td> <td data-bbox="1256 1062 2199 1142"> <p><b>Measure Twice: Lead Change With Better Change Metrics</b> Speakers: Katy Tynan, VP, Principal Analyst, Forrester</p> </td> </tr> <tr> <td data-bbox="315 1142 1256 1198"> <p><b>DEPLOY TECHNOLOGY WITH INTENT</b></p> </td> <td data-bbox="1256 1142 2199 1198"></td> </tr> <tr> <td data-bbox="315 1198 1256 1318"> <p><b>How To Grow Your Brand's Visibility Across Answer Engines</b> Speakers: Emily Collins, VP, Research Director, Forrester Bradley Breuer, Senior Vice President of Marketing, PetSmart</p> </td> <td data-bbox="1256 1198 2199 1318"></td> </tr> </table>		<p><b>MAKE YOUR STRATEGY UNMISTAKABLE</b></p>	<p><b>OPERATE ON A FOUNDATION AI CAN'T BUILD</b></p>	<p><b>Drive Growth With An AI-Powered Total Experience</b> Speakers: Dipanjan Chatterjee, Vice President, Principal Analyst, Forrester</p>	<p><b>Measure Twice: Lead Change With Better Change Metrics</b> Speakers: Katy Tynan, VP, Principal Analyst, Forrester</p>	<p><b>DEPLOY TECHNOLOGY WITH INTENT</b></p>		<p><b>How To Grow Your Brand's Visibility Across Answer Engines</b> Speakers: Emily Collins, VP, Research Director, Forrester Bradley Breuer, Senior Vice President of Marketing, PetSmart</p>	
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<p>11:10 am – 12:10 pm PDT</p>	<p><b>Workshop: Build Your CX ROI Story</b></p> <p>Speakers: Judy Weader, Principal Analyst, Forrester</p>									

Tuesday, Jun 30

<p>11:50 am – 12:20 pm PDT</p>	<p><b>Breakout Sessions</b></p> <table border="1"> <tr> <td data-bbox="315 247 1258 304"> <p><b>MAKE YOUR STRATEGY UNMISTAKABLE</b></p> </td> <td data-bbox="1258 247 2199 304"> <p><b>OPERATE ON A FOUNDATION AI CAN'T BUILD</b></p> </td> </tr> <tr> <td data-bbox="315 304 1258 384"> <p><b>Prepare For AI Agents As Your New Target Audience</b> Speakers: Chuck Gahun, Principal Analyst, Forrester</p> </td> <td data-bbox="1258 304 2199 384"> <p><b>Stakeholder Academy: How To turn Skeptics Into Sponsors</b> Speakers: Angelina Gennis, Principal Analyst, Forrester</p> </td> </tr> <tr> <td data-bbox="315 384 1258 614"> <p><b>DEPLOY TECHNOLOGY WITH INTENT</b></p> <p><b>What Great Customer Self-Service Looks Like</b> Speakers: Max Ball, Principal Analyst, Forrester Joe Wang, Director of Customer and Community Experience, Ancestry Guneet Singh, Vice President, Customer Experience &amp; Care, Appfolio Francesca Del Gobbo, Technical Product Manager — Conversational AI, Fabletics</p> </td> <td data-bbox="1258 384 2199 614"></td> </tr> </table>	<p><b>MAKE YOUR STRATEGY UNMISTAKABLE</b></p>	<p><b>OPERATE ON A FOUNDATION AI CAN'T BUILD</b></p>	<p><b>Prepare For AI Agents As Your New Target Audience</b> Speakers: Chuck Gahun, Principal Analyst, Forrester</p>	<p><b>Stakeholder Academy: How To turn Skeptics Into Sponsors</b> Speakers: Angelina Gennis, Principal Analyst, Forrester</p>	<p><b>DEPLOY TECHNOLOGY WITH INTENT</b></p> <p><b>What Great Customer Self-Service Looks Like</b> Speakers: Max Ball, Principal Analyst, Forrester Joe Wang, Director of Customer and Community Experience, Ancestry Guneet Singh, Vice President, Customer Experience &amp; Care, Appfolio Francesca Del Gobbo, Technical Product Manager — Conversational AI, Fabletics</p>	
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<p>12:20 pm – 1:50 pm PDT</p>	<p><b>Networking Lunch</b></p>						
<p>12:30 pm – 1:30 pm PDT</p>	<p><b>Government Lunch</b></p> <p>Speakers: Colleen Fazio, Senior Analyst, Forrester Rick Parrish, VP, Research Director, Forrester</p>						
<p>12:30 pm – 1:15 pm PDT</p>	<p><b>Lunch &amp; Learn Case Study</b></p> <p><b>NICE: Designing The Proactive Contact Center AI, Orchestration, And Human-Centered Engagement At Scale</b> Speakers: Sherry Fragomeni, Senior Product Manager, Outbound, CX, NICE</p> <p><b>WhatsApp: Conversations At Scale: How WhatsApp + AI Can Help Drive Loyalty Without Inflating Costs</b></p>						
<p>1:55 pm – 2:15 pm PDT</p>	<p><b>Keynote: Distrust In The Age Of AI</b></p> <p>Speakers: Jess Lloyd, Principal Analyst, Forrester</p>						
<p>2:15 pm – 2:35 pm PDT</p>	<p><b>Keynote: The Human Foundation Of The AI-Powered Enterprise</b></p> <p>Speakers: Colleen Fazio, Senior Analyst, Forrester</p>						

Tuesday, Jun 30

<p>2:50 pm – 4:40 pm PDT</p>	<p><b>The Total Forrester Experience: Executive Challenge (Automotive Scenario)   Group 8 &amp; 9</b></p> <p>Speakers: Angelina Gennis, Principal Analyst, Forrester</p> <p><b>Group 8: 2:50 pm - 3:40 pm</b></p> <p><b>Group 9: 3:50 pm - 4:40 pm</b></p>									
<p>2:55 pm – 3:40 pm PDT</p>	<p><b>Customer Service Meet Up</b></p> <p>Speakers: Max Ball, Principal Analyst, Forrester Dave Frankland, VP, Research Director, Forrester</p>									
<p>2:55 pm – 3:55 pm PDT</p>	<p><b>Workshop: Activate Your CX Ecosystem With Stakeholder Relationships</b></p> <p>Speakers: Su Doyle, Principal Analyst, Forrester</p>									
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Tuesday, Jun 30

<p>3:45 pm – 4:10 pm PDT</p>	<p><b>Analyst-Led Roundtables</b></p> <p><b>Designing With AI Without Losing Trust</b> Speakers: Gina Bhawalkar, Principal Analyst, Forrester</p> <p><b>The Power Of Total Experience</b> Speakers: Dipanjan Chatterjee, Vice President, Principal Analyst, Forrester</p> <p><b>A Culture-First Mindset For AI Adoption</b> Speakers: Angelina Gennis, Principal Analyst, Forrester</p> <p><b>Preparing Your Business For Agentic Commerce</b> Speakers: Chuck Gahun, Principal Analyst, Forrester</p>									
<p>4:05 pm – 5:05 pm PDT</p>	<p><b>Workshop: Successfully Deploy AI-Powered Customer Self-Service</b></p> <p>Speakers: Max Ball, Principal Analyst, Forrester Chuck Gahun, Principal Analyst, Forrester</p>									
<p>4:10 pm – 4:55 pm PDT</p>	<p><b>Breakout Sessions</b></p> <table border="1" data-bbox="315 802 2201 1110"> <tr> <td data-bbox="315 802 1256 858"> <p><b>MAKE YOUR STRATEGY UNMISTAKABLE</b></p> </td> <td data-bbox="1256 802 2201 858"> <p><b>OPERATE ON A FOUNDATION AI CAN'T BUILD</b></p> </td> </tr> <tr> <td data-bbox="315 858 1256 967"> <p><b>Build A CX Strategy That's Unmistakably Yours</b> Speakers: Judy Weader, Principal Analyst, Forrester</p> </td> <td data-bbox="1256 858 2201 967"> <p><b>Build Better Experiences With An AI-Enabled Design Workflow</b> Speakers: Gina Bhawalkar, Principal Analyst, Forrester Heidi Munc, VP of User Experience, Nationwide</p> </td> </tr> <tr> <td data-bbox="315 967 1256 1023"> <p><b>DEPLOY TECHNOLOGY WITH INTENT</b></p> </td> <td data-bbox="1256 967 2201 1023"></td> </tr> <tr> <td data-bbox="315 1023 1256 1110"> <p><b>Make Data The Winning Factor For Modern CX Strategy</b> Speakers: Rich Saunders, Senior Analyst, Forrester</p> </td> <td data-bbox="1256 1023 2201 1110"></td> </tr> </table>		<p><b>MAKE YOUR STRATEGY UNMISTAKABLE</b></p>	<p><b>OPERATE ON A FOUNDATION AI CAN'T BUILD</b></p>	<p><b>Build A CX Strategy That's Unmistakably Yours</b> Speakers: Judy Weader, Principal Analyst, Forrester</p>	<p><b>Build Better Experiences With An AI-Enabled Design Workflow</b> Speakers: Gina Bhawalkar, Principal Analyst, Forrester Heidi Munc, VP of User Experience, Nationwide</p>	<p><b>DEPLOY TECHNOLOGY WITH INTENT</b></p>		<p><b>Make Data The Winning Factor For Modern CX Strategy</b> Speakers: Rich Saunders, Senior Analyst, Forrester</p>	
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<p>4:10 pm – 4:55 pm PDT</p>	<p><b>Executive Leadership Exchange (Invite-Only): Exclusive Keynote Q&amp;A</b></p> <p>Speakers: Ron Rogowski, VP, Executive Partner, Forrester Jen Sanning, Executive Partner, Forrester Duncan Wardle, Former Head of Innovation &amp; Creativity, Disney, Lucasfilm, Marvel &amp; Pixar Mack McGee, Chief Marketing Officer, CareFirst BlueCross BlueShield</p>									
<p>5:05 pm – 5:10 pm PDT</p>	<p><b>Welcome Back</b></p> <p>Speakers: Rick Parrish, VP, Research Director, Forrester</p>									

**Tuesday, Jun 30**

5:10 pm – 5:40 pm PDT	<b>Keynote: Hype Or Happening? The Human + AI Showdown.</b>  Speakers: Mike Proulx, VP, Research Director, Forrester James L. McQuivey, PhD, VP, Research Director, Forrester Jess Lloyd, Principal Analyst, Forrester Colleen Fazio, Senior Analyst, Forrester
5:40 pm – 5:45 pm PDT	<b>Closing Remarks</b>  Speakers: Rick Parrish, VP, Research Director, Forrester
5:50 pm – 6:45 pm PDT	<b>Reception</b>