



# 2023 Ultimate CX Conference

VIRTUAL EVENT  
December 6 – 7, 2023

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# Ultimate CX Conference

Today We Are All a CXO

December 6 – 7, 2023

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*In a post-COVID world in which individuals are placing a higher priority on experience than ever, in which AI and continuing waves of digital transformation can make precise personalization and instant responsiveness a reality, and in which enterprises are increasingly embracing customer-centricity across every function, we need a CXO perspective in every role. Learn how the best listen to the voice of the customer and use it to spark action at every level, driving innovation and growth in the process.*

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## DAY ONE

**Wednesday, December 6, 2023**

11:15 am – 11:20 am ET

### Opening Remarks

**Ivan Pollard**, Center Leader, Marketing & Communications and Conference Co-Chair, **The Conference Board**

11:20 am – 11:55 am ET

### The Head of Global Customer Experience at Hitachi on What It Takes to Drive Customer-Centric Culture Effectively

To open our conference we welcome Tabitha Dunn, Head of Global Customer Experience at Hitachi, who will draw from experiences building CX functions in multiple companies and sectors to share what it takes to drive a customer-centric culture – including structures, metrics, influence, and change management.

**Tabitha Dunn**, Head of Global Customer Experience, **Hitachi**

Moderator: **Ivan Pollard**, Center Leader, Marketing & Communications and Conference Co-Chair, **The Conference Board**

11:55 am – 12:00 pm ET **Break**

12:00 pm – 12:35 pm ET

### How AI Is Remaking the Customer Experience at Lemonade

This past June, the insurance company Lemonade set a world record by approving an insurance claim in two seconds, achieving this feat by leveraging AI and machine learning to revolutionize claims processing. We welcome Lemonade's Chief Claims Officer to share how customer-centric and empathetic use of AI can reshape the customer experience.

**Sean Burgess**, Chief Claims Officer, **Lemonade**

Moderator: **Tom Grothues**, Program Director, Customer Experience Council and Conference Co-Chair, **The Conference Board**

12:35 pm – 12:40 pm ET **Break**

12:40 pm – 1:15 pm ET

### The Chief Experience Officer of Northwell Health on Empathy-Based Transformation

Northwell Health's Sven Gierlinger brings multiple unique perspectives on transforming the patient experience. Having served as a luxury hotel executive earlier in his career, it wasn't until he spent three months in hospitals as a patient himself that he was personally motivated to challenge the status quo in healthcare. Now at Northwell Health, one of the largest integrated delivery networks in the country, he is driving cultural transformation grounded in patient centeredness and empathy.

In this conversation, learn how the patient experience is being reshaped at Northwell Health, from bringing in a Michelin-starred chef to help overhaul the way hospital kitchens were being run to leveraging technology to enhance healthcare access and human connections.

**Sven Gierlinger**, Senior Vice President, Chief Experience Officer, **Northwell Health**

Moderator: **Ivan Pollard**, Center Leader, Marketing & Communications and Conference Co-Chair, **The Conference Board**

1:15 pm – 1:45 pm ET **Break**

1:45 pm – 2:15 pm ET

### Creating an Inspiring Fan Experience, Win or Lose, with the Oklahoma City Thunder

The Oklahoma City Thunder basketball team can't guarantee a win every time -- but they can guarantee a customer experience for attendees and fans that creates connection and cements loyalty. Hear how each employee becomes part of that experience, and what other sectors can learn from it.

**Joy Joslin**, Director, Guest Relations and Safety, **Oklahoma City Thunder**

2:15 pm – 2:20 pm ET **Break**

2:20 pm – 2:50 pm ET

### Case Study: How FORVIS Created a Culture Focused on "Unmatched Client Experience"

How can a combination of equals, in one of the largest mergers in accounting history, come together with one mission and purpose to deliver industry-leading CX? For FORVIS, the answer centered on a shared purpose of helping those they serve unlock their full potential by "Delivering an Unmatched Client Experience™." Learn how a remarkable culture-building campaign - including a book - and unique client experiences led to a Net Promoter Score vaulting far above the industry average.

**Gregory A. Cole**, Chief Marketing Officer, **FORVIS**

**Alice Grey Harrison**, Managing Partner, **AGH Communications Group**

2:50 pm – 2:55 pm ET **Break**

2:55 pm – 3:25 pm ET

## Empowering Every Employee to Be an Experience Leader

Perhaps more than ever before, organizations understand that the employee experience is crucial to great customer experience. Gain practical examples of how organizations are using communications, technology, and flexibility to empower and inspire frontline employees.

**Dea Fischer**, Senior Director, Global Head of Culture, Communications, and Impact, **Squarespace**

**Mandy Mooney**, Director of Internal Communications, **Prologis**

Moderator: **Danielle Badler**, Program Director, Corporate Communications Strategy II and Internal Communications Councils, **The Conference Board**

3:25 pm – 3:30 pm ET

## Closing Remarks

**Ivan Pollard**, Center Leader, Marketing & Communications and Conference Co-Chair, **The Conference Board**

3:35 pm – 4:00 pm ET

## Networking Discussion: Challenges, Opportunities, and Takeaways

Connect with fellow CX leaders "face-to-face" via Zoom to share insights on challenges and opportunities for the coming year and takeaways from the first day of the program.

Facilitator: **Denise Dahlhoff, PhD**, Director, Marketing & Communications Research, **The Conference Board**

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# DAY TWO

## Thursday, December 7, 2023

11:15 am – 11:20 am ET

## Opening Remarks

**Tom Grothues**, Program Director, Customer Experience Council and Conference Co-Chair, **The Conference Board**

11:20 am – 11:55 am ET

## New Relationships with Iconic Brands

Discover how some iconic brands – some with decades or a century of history – are revitalizing their customer relationships through new platforms, new communications channels, and new experiences.

**Dawn Rodney**, Chief External Affairs Officer, **National Park Foundation**

**Amy Wigler**, Vice President, Multiplatform Marketing and Content, **PBS**

Moderator: **Ivan Pollard**, Center Leader, Marketing & Communications and Conference Co-Chair, **The Conference Board**

11:55 am – 12:00 pm ET **Break**

12:00 pm – 12:40 pm ET

## How Generative AI Will Reshape Customer Service, Marketing, and Much More

In this conversation with esteemed professor and author Erik Brynjolfsson, we'll examine what impact generative AI has had in marketing, where generative AI is headed, and how companies can plan for what comes next. Beginning with a study on the use of GenAI by customer-service agents, we'll consider how customer experience, employee experience, and productivity were improved and then discuss how enterprises and CX leaders should think about the great many other tasks that can be enhanced by this revolutionary technology. We'll also gain insight into some of the innovations expected ahead, some of which will make present-day capabilities resemble early steam engines. Questions from the audience – from understanding the big picture to seeking tactical advice – will be welcomed.

**Erik Brynjolfsson, PhD**, Jerry Yang and Akiko Yamazaki Professor and Senior Fellow, **Stanford Institute for Human-Centered AI**; Director, **Stanford Digital Economy Lab**; and Author, *The Second Machine Age*

**Denise Dahlhoff, PhD**, Director, Marketing & Communications Research, **The Conference Board**

12:40 pm – 11:10 pm ET **Break**

1:10 pm – 1:50 pm ET

## Building Trust

Trust is the foundation upon which the customer experience and relationship rests. It is essential to establish, requires vigilance to maintain, and can be extraordinarily hard to rebuild if lost. Hear how trust is built and maintained during key moments in customer and patient journeys.

**Jeanine Maier**, Vice President, Consumer Experience, **Kaiser Permanente**

1:50 pm – 2:00 pm ET **Break**

2:00 pm – 2:30 pm ET

## Synergy over Silos: Lenovo's Organizational Strategy for Providing Better Experiences for All

As companies once again brace for "techceleration," global CXOs are being asked to deliver game-changing insights to understand not only their customers, but their users, their partners, and their employees.

In this session, we'll explore why the Lenovo Experience Group (LXG) was created to drive end-to-end focus on CX, UX, and EX-centric processes by daily generating personalized, holistic, and total experiences for all. Learn how centralizing survey feedback and research efforts across regions, products, and services/solutions has fostered organization-wide ownership of actions to drive continuous experience improvement.

**Dilip Bhatia**, Vice President, Chief Experience Officer, **Lenovo**

2:30 pm – 2:35 pm ET **Break**

2:35 pm – 3:05 pm ET

### **Scaling up a Personal Relationship: How Edward Jones Connects Clients, Front-Line Advisors, and Brand**

How does an organization that relies on building personalized relationships with each of their customers scale that experience into a consistent brand identity? In this conversation with Edward Jones' Tim Rea, learn how the enterprise strikes the right balance between establishing trust in their overall brand with making an individualized connection between each client and their financial advisor at the local-branch level. We will also explore increasing client expectations for an authentic, holistic experience that is supported by seamless technology.

**Tim Rea**, Chief Experience, Brand and Marketing Officer, **Edward Jones**

Moderator: **Jasmine Green**, Vice President, Enterprise Customer Solutions and Enablement, **Nationwide**

3:05 pm – 3:15 pm ET

### **Closing Remarks and Discussion on Our Takeaways from the Conference**

We conclude the conference by again connecting with fellow attendees via chat to share key takeaways from the Ultimate CX conference.

**Tom Grothues**, Program Director, Customer Experience Council and Conference Co-Chair, **The Conference Board**