

OCTOBER 15-17 • DOWNRIGHT AUSTIN • AUSTIN, TX



CHIEF EXPERIENCE OFFICER EXCHANGE: EMERGING TECH

CHIEF EXPERIENCE
OFFICER EXCHANGE
EMERGING TECH™

Pilot to Payoff: Intentional Design for Seamless Journeys

WELCOME TO THE CXO EMERGING TECHNOLOGY EXCHANGE!

The future of customer experience is now.

At the CXO Emerging Technology Exchange, CX leaders converge for a high-impact, closed-door forum designed to tackle what's next. As AI, automation, and immersive tech accelerate change, staying ahead means rethinking how we build trust, deliver precision, and drive performance.

Over three focused days, you'll gain practical insights and real-world strategies across three mission-critical areas:

Trust, Safety & Ethics in AI-Powered CX: Build customer confidence through transparency, governance, and responsible AI.

Precision-Crafted Journeys & Operational Excellence: Harness emerging tech to eliminate friction, personalize at scale, and streamline service.

Future-Proofing CX Through Agile Teams & Digital Fluency: Equip your workforce and operations for the demands of tomorrow—today.



Jake Frederico
Research Analyst & Program Manager
Customer Management Practice



THE EXCHANGE DIFFERENCE



"There's so much AI and technology out there, the exposure to it is what's key. You can't change what you're not exposed to or what you don't have knowledge of. This is definitely a knowledge-based hub where you get all types of information concerning AI, customer experience, and contact."

- Chief Employee Experience & Workforce Development, **U.S. Department of Veteran's Affairs**



Exclusive Networking

Enjoy exclusive, peer-level networking with senior CX and EX executives in a curated, invite-only setting.



Thought Leadership & Innovation

Gain valuable insights from industry thought leaders, exchange ideas, and benchmark with peers to explore innovative, actionable solutions to today's most pressing CX and EX challenges.



Strategic Consultations

Engage in personalized, one-on-one consultations with top solution providers to explore strategic tools and technologies tailored to your business needs.



Personalized Agenda

Customize your experience with a dynamic mix of panels, workshops, and discussions designed to address your unique challenges and objectives.

CONNECT WITH INDUSTRY LEADERS

Our delegates are hand-picked for the unique advantage they bring to each Exchange, creating an unparalleled level of discussion and an ideal environment for idea generation. We qualify all attendees on job function, strategic responsibility, and budgeting authority to ensure you're guaranteed to network and engage with senior level executives within the customer experience industry.

KEY QUALIFICATIONS



Active project requirements with solution needs

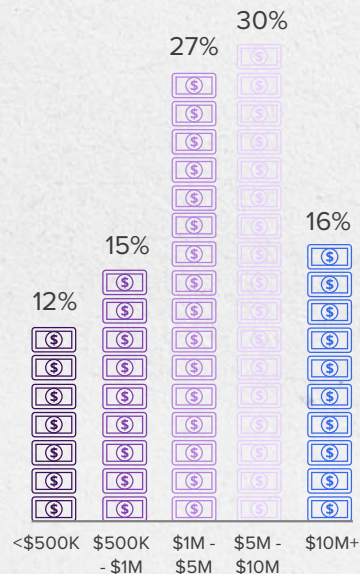


Directly controls or influences budgetary decisions

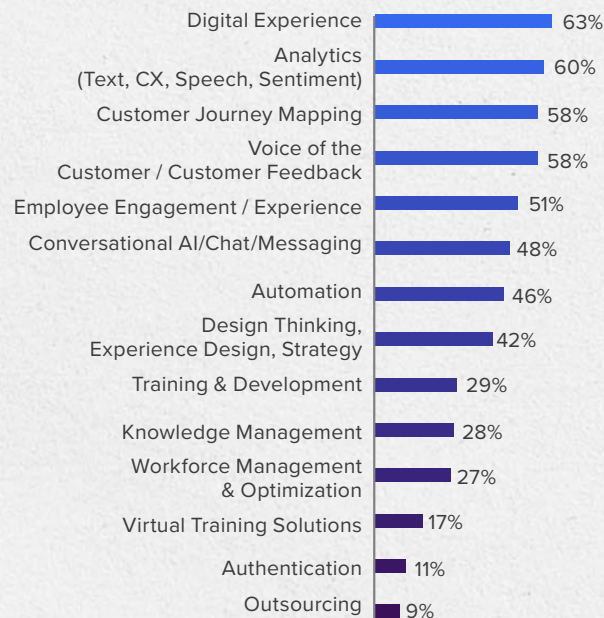


Directly controls or influences marketing operations & strategy

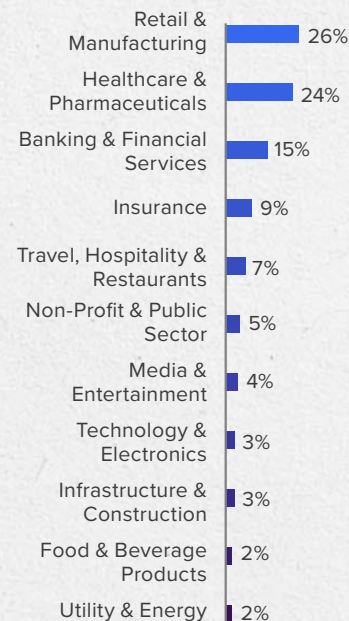
BUDGETS FOR CX SOLUTIONS



TOP PRIORITIES FOR EXECUTIVES



INDUSTRY BREAKDOWN



JOB TITLES

Chief Brand Officer
Chief Client Officer
Chief Customer Officer
Chief Design Officer
Chief Digital Officer
Chief Experience Officer
Chief Innovation Officer
Chief Marketing Officer
Chief Patient Experience Officer

VPs & Heads of:

Analytics
Brand Experience
Brand Experience & Strategy
Brand Loyalty
Client Management
Communications/Social Media
Consumer Intelligence
Customer Loyalty
Customer and Employee Experience
Customer Engagement
Customer Experience Marketing
Customer Success
Data Analytics and Insight
Digital Experience
Digital Marketing
Digital Strategy
Employee Engagement
Employee Experience
Experience Design
Human-Centered Design
Journey Mapping
Marketing Strategy Continuous Improvement
Mobile and Digital Experience
Omnichannel
Organizational Design
Product Strategy
Service Design
Social Media & Listening
Strategy & Transformation
User Experience (UX)
Voice of Customer Strategy

MEET OUR INDUSTRY LEADERS & INNOVATORS



Nishtha Jain
Head of Innovation & Digital Technology
Thought Leader and TEDx Speaker



David Phipps
Chief Technology Officer
Generation Tux



Ginny Couvillon
Head of Client & Field Services, Global Wealth Management, Americas
UBS



David Weisman PhD
Chief Experience Officer
NYC Health + Hospitals-Queens



Sandhya Kamineni
Director, Digital & Data Science of Product Management
Johnson & Johnson



Adam Pruitt
Vice President, Design & CX
JP Morgan Chase



Sarah Baker
Senior Director of CX
TodayTix



Anu Chatterjee
Director of Analytics
PepsiCo



Zach Bolena
Vice President, Experience Design (AI Strategies)
JP Morgan Chase



Emilio Harrison
Vice President of User Experience Research
JP Morgan Chase



Nick Birkby
Lead UX Research
Flex



Govind Agarwal
Customer Experience & Program Management Lead
Microsoft



Sam Hanks
Director of Digital CX
National Association of REALTORS®



Josef Hapli
Senior Director of Digital Engagement
National Geographic



Ian Tempro
COO
IA Solutions



Seun Aiyese
President, Head of Retail Banking
Southern Bancorp

MEET OUR INDUSTRY LEADERS & INNOVATORS



Catheryn Li
Co-Founder & CEO
SIMPLE AI



Jason Ten-Pow
President
BespokeCSI



Paul Lima
Managing Partner
Lima Consulting



Varun Soni
Enterprise Account
Executive
LiveKit



Sean Albertson
CX Consultant
CX on the ROCKS



James Brown
Managing Relationships-
Apple & Google
FirstClassConnection



INDUSTRY BREAKDOWN

FINANCIAL SERVICES/ BANKING/ INSURANCE

Key Themes:

Personalization at scale, regulatory constraints, trust-building, omnichannel optimization, AI/ML-driven insights.



Ginny Couvillon



Adam Pruitt

Emilio Harrison

Zach Bolena



Seun Aiyese

PHARMA/ LIFE SCIENCES/ HEALTHCARE

Key Themes:

Ethical AI, digital therapeutics, patient-centric UX, data privacy, predictive analytics.



Nishtha Jain



Sandhya Kamineni



David Weisman PhD

RETAIL/ E-COMMERCE/ CONSUMER GOODS

Key Themes:

Real-time personalization, loyalty innovation, inventory + CX alignment, hybrid experiences.



Anu Chatterjee

DIGITAL PLATFORMS

Key Themes:

Product-led experience, seamless partner ecosystems, UX optimization, global delivery.



David Phipps



Sarah Baker



Nick Birkby



Govind Agarwal

KEY DISCUSSION THEMES

1

Seamless Journeys Through Intelligent Orchestration

Today's customers expect fast, frictionless experiences—and leading organizations are delivering with smart, connected systems. From logistics to customer service, automation is turning complexity into clarity.

- AI-powered logistics platforms optimize routes and reduce wait times
- Travel companies use automation to rebook flights instantly during disruptions
- Banks and insurers streamline onboarding with self-service tools and AI chatbots
- Unified dashboards and gamified interfaces break down silos and boost satisfaction.

2

Transforming Operations & Empowering the Workforce

Forward-thinking organizations are combining human expertise with intelligent automation to create agile, future-ready teams—enhancing both employee experience and customer outcomes.

- AI copilots assist contact center agents with real-time suggestions to improve speed and empathy
- Hospitality brands equip staff with dashboards for instant, actionable customer insights
- Healthcare systems use AI tools for scheduling and triage, freeing staff for higher-value care
- Automation boosts personalization, efficiency, and operational agility across the customer journey

3

Designing the Future: Immersive, Generative & Adaptive CX

Customer experience is becoming more interactive, predictive, and personal—driven by emerging tech like generative AI and immersive platforms that reshape how brands engage.

- Retailers use generative AI for real-time product descriptions and tailored campaigns
- VR showrooms let customers explore and customize before they buy
- Financial firms deploy AI avatars for 24/7, human-like guidance
- Immersive simulations enhance employee onboarding and training across industries

MEET OUR CX ADVISORY BOARD



Shantanu Das
GM - Global Head of
Post Order Customer
Experience
Wayfair



Wes Dudley
VP, Customer
Experience
Broad River Retail



Adam McCreery
Director, CX
DraftKings, Inc.



Anne Palmerine
VP, Customer
Engagement and
Enrollment Services
UPMC Health Plan



Mark Killick
Senior Vice President,
Experiential Operations
Shipt.



SNAPSHOT AGENDA

Immerse yourself in three days of strategic learning, peer exchange, and high-impact networking.

DAY 1

WEDNESDAY | OCTOBER 15, 2025

10:00 AM Check In Opens + Coffee

10:30 AM Exchange Orientation + Opening Remarks

10:45 AM **CMP Research Signature Study | AI for CX: Presenting CMP Research Prism for Customer Analytics**

11:15 AM Keynote

11:45 AM Networking Brunch

12:30 PM Business Meetings

1:30 PM Comfort Break

1:45PM Expert Insights

2:15 PM Expert Insights

2:45 PM Networking Break

3:15 PM Business Meetings

4:45 PM Comfort Break

5:00 PM Interactive Panel

6:00 PM Welcome Reception

DAY 2

THURSDAY | OCTOBER 16, 2025

8:00 AM Breakfast

8:45 AM Opening Remarks

9:00 AM Keynote

9:30 AM Executive Forum

10:00 AM Video Spotlight

10:05 AM Networking Break

10:30 AM Business Meetings

12:00 PM Networking Lunch

1:00 PM QuickFire Spotlight

1:30 PM Think Tank

2:15 PM Business Meetings

3:45 PM Networking Break

4:15 PM Masterclass

5:00 PM Networking Reception

DAY 3

FRIDAY | OCTOBER 17, 2025

8:00 AM Breakfast

8:30 AM Opening Remarks + CCWomen Breakfast

9:00 AM Interactive Workshops & Live Demo

9:30 AM Business Meetings

10:30 AM Networking Break

11:00 AM CCW Digital: Market Research

12:00 PM Exchange Concludes

DAY 1

WEDNESDAY, OCTOBER 15, 2025

10:00 AM **Check-In Opens + Coffee**

10:30 AM **Exchange Orientation + Opening Remarks**



Jake Frederico
Research Analyst & Program Manager
Customer Management Practice

10:45 AM

CMP RESEARCH SIGNATURE STUDY I **AI for CX: Presenting CMP Research Prism for Customer Analytics**

Companies are looking to better understand their customers so can serve them more proactively. That's one reason why 68% of companies are increasing investments in customer analytics tools. AI is expanding what analytics tools can do and better UX, ease of use, upgraded visualizations and more are helping analytics and Voice of Customer teams move beyond reactive data, like post-contact surveys. How should you differentiate customer analytics providers and what do marketplace trends suggest about this technology category? Learn more from CMP Research as it unveils its latest Prism for Customer Analytics Tools.

Jordan Zivoder
Quantitative Research Lead
CMP Research



DAY 1

WEDNESDAY, OCTOBER 15, 2025

11:15 AM

KEYNOTE | The Humans beyond the Tech: The Future of Workforce-Driven CX

As customer expectations evolve, the front line of service is being redefined. Technology is no longer about replacing humans—it's about equipping them.

This session explores how AI-driven agent assist tools, voice of customer (VOC) insights, and analytics from call notes are transforming the way employees engage with customers and inform broader operational strategy. Seun will share how blending digital efficiency with human empathy empowers the workforce, creates seamless experiences, and ensures customer trust in a digital-first era.

This session will explore:

- Blending Digital + Human: How agent assist, AI-driven engagement, and VOC insights enhance customer interactions while preserving authentic human connection.
- Call Notes to Strategy: Leveraging analytics from frontline interactions to inform customer strategy, optimize operations, and anticipate needs.
- Workforce Empowerment: Equipping employees with the right tools, skills, and culture to become trusted advisors and experience multipliers.

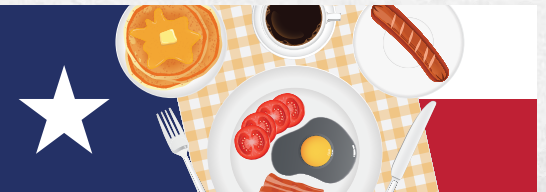


Seun Aiyese
 President, Head of Retail Banking
 Southern Bancorp

11:15 AM

Lonestar Networking Brunch

Kick off Day One with a true Texas welcome. Take a break and recharge over brunch while expanding your network. This is your chance to connect with peers in a more relaxed setting before diving back into the afternoon sessions.



12:30 PM

Business Meetings

1:30 PM

Comfort Break

1:45 PM

EXPERT INSIGHTS | The Social Safety Balancing Act: Navigating Trust, Safety, and AI in CX

As the digital world continues to evolve, the design of social platforms has far-reaching implications for user well-being, trust, and safety. In this forward-thinking keynote, Nishtha Jain examines the unintended consequences of current platform design and makes a compelling case for integrating safety as a core design principle. With the rise of generative and agentic AI accelerating user engagement and personalization, Jain explores the need for clearer accountability standards, including the potential for digital safety labels. Drawing from cross-industry examples and human-centered design approaches, this session challenges CX, UX, and technology leaders to prioritize trust, ethics, and user protection at the foundation of innovation.



Nishtha Jain
 Head of Innovation & Digital Technology
 Takeda

DAY 1

WEDNESDAY, OCTOBER 15, 2025

2:15 PM

QuickFire Spotlight

Quantum computing promises to revolutionize data processing, optimization, and personalization in CX—but the technology is still emerging. This visionary session explores potential quantum applications in customer experience and how leaders can prepare strategically.

Key Takeaways:

- Understand basic quantum computing concepts relevant to CX.
- Explore potential impacts on data analytics, personalization, and AI.
- Identify early use cases and pilot opportunities for quantum tech.
- Develop strategies for monitoring and preparing for quantum advancements.



Paul Lima
Managing Partner
[Lima Consulting](#)



James Brown
Managing Relationships-
Apple & Google
[First Class Connection](#)



Varun Soni
Enterprise Account Executive
[LiveKit](#)

2:45 PM

ATX Networking Break

3:15 PM

Business Meetings

4:45 PM

Comfort Break

5:00 PM

EXPERT PANEL | Designing Experiences Customers Crave — and Building the Workforce to Deliver Them

AI is everywhere — but slapping tools onto broken processes isn't transformation. It's window dressing. The real opportunity is rethinking how we design experiences that customers actually want, and employees are empowered to deliver.

This panel brings together leaders who have seen both the hype cycle and the hard lessons of tech-led change. They'll unpack what it really takes to make AI a value-driver for CX: modernizing journeys, protecting the human touch, and building growth engines instead of cost traps.

DAY 1

WEDNESDAY, OCTOBER 15, 2025

From deploying sentiment AI without killing empathy, to creating automation that respects cultural nuance, to upskilling teams into true CX designers, these leaders will show how to move past efficiency theater and deliver impact that lasts.

Discussion topics include:

- Moving from service metrics to customer value while deploying emerging tech
- Operationalizing automation without betraying trust or personalization
- Designing AI-driven experiences that adapt to cultural nuance
- Building the workforce as CX innovators, not order-takers
- Avoiding past mistakes: offshoring, over-automation, one-size-fits-all fixes
- Crafting a customer-first (not CFO-first) AI strategy

Moderated by:



Audrey Steeves

Managing Director, Digital

Customer Management Practice



Ginny Couvillon

Head of Client and Field Services,
Global Wealth Management Americas

UBS



Sarah Baker

Senior Director Customer Experience

TodayTix



David Weisman PhD

Chief Experience Officer

NYC Health + Hospitals-Queens

6:00 PM

Cowboys and Champagne Reception



COWBOYS + Champagne

Unwind from a full day of sessions and ease into the evening with bubbles and bites. This reception blends rugged Texas charm with posh bubbly elegance. Guests can sip champagne, kick up their heels to a honky-tonk beat, and enjoy refined takes on classic Southern fare.

DAY 2

THURSDAY, OCTOBER 16, 2025

8:00 AM **Rise & Shine Breakfast**

8:45 AM **Chairperson's Opening Remarks**



Jake Frederico
 Research Analyst & Program Manager
Customer Management Practice

9:00 AM **EXPERT INSIGHTS | Designing with Intention: Human-Centered Innovation Across Industries**

In a time when innovation is often reduced to buzzwords and AI dominates the conversation, how can we stay grounded in what actually matters to users? In this engaging mainstage, UX strategist Nick Birkby draws on his cross-industry journey to explore what it truly means to design with people in mind. Attendees will gain a fresh perspective on user-centered research, cross-functional collaboration, and the role of intentional design in creating seamless digital experiences. With practical takeaways and real-world stories this talk unpacks how to bring humanity into innovation.



Nick Birkby
 Lead UX Research
Flex

9:30 AM **EXECUTIVE FORUM | The Speed of Alignment: Accelerating Transformation Through Unified CX**

Racing to innovate without the right structure is a recipe for fragmentation, wasted spend, and stalled adoption. The real differentiator isn't speed alone—it's disciplined execution.

This dynamic panel brings together leaders who are proving that governance and agility can co-exist. From consolidating platforms to scaling smarter change frameworks, you'll hear how aligning technology, governance, and customer goals delivers sustainable CX impact.

You'll hear real-world stories on:

- Cut complexity and unlock faster time-to-value by consolidating tools
- Elevate CX with unified platforms and real-time insights
- Drive transformation at scale through cross-functional alignment
- Build adoption from day one with agile, accountable frameworks
- Create a culture where innovation sticks—not just sparks
- You'll walk away with proven strategies to unify digital efforts, elevate CX, and accelerate transformation—without losing sight of what matters most.

Moderated by:



Audrey Steeves
 Managing Director, Digital
Customer Management Practice



Sandhya Kamineni
 Director - Digital and Data Science
 Product management
Johnson and Johnson



Anu Chatterjee
 Director Analytics
PepsiCO

DAY 2

THURSDAY, OCTOBER 16, 2025

10:00 AM **Video Spotlight** Sponsored by: **COGNIGY**

10:05 AM **Silicon Hills Networking Break**

10:30 AM **Business Meetings**

12:00 PM **Tex Mex Networking Lunch**

Refuel mid-day with a Tex-Mex spread that's all about flavor and fun. Guests can build their own tacos and burritos with fresh ingredients and bold toppings, paired with refreshing, freshly brewed iced tea.

A casual, customizable lunch that brings everyone together—Texas style.



1:00PM **MASTERCLASS | Rewriting the CX Playbook from Friction to Formation**

CX is on the rocks, and that's exactly where transformation begins. Today's CX challenges are the terrain that shapes lasting impact. From outdated metrics to rising expectations, we reveal how to lead through the turbulence using his People–Process–Platform model. You'll walk away with fresh insights, practical tools, and a renewed sense of ownership to create seamless, loyalty-driving experiences, no matter how rough the waters get.

Key Takeaways:

- Reframe friction as formation with a powerful CX metaphor that inspires action.
- Upgrade your CX playbook by shifting from survey-driven tactics to experience-led strategy.
- Align people, process, and platform to deliver seamless, loyalty-boosting journeys.
- Lead the evolution by becoming a connector, storyteller, and catalyst for change.



Jason Ten-Pow
President
BespokeCSI



Sean Albertson
CX Consultant
CX on the ROCKS

1:30 PM **Comfort Break**

DAY 2

THURSDAY, OCTOBER 16, 2025

1:45PM **Business Meetings**

3:00 PM **ICED TEA AND TECH TALK Networking Break**

3:30 PM **THINK TANK | Unlocking the Power of AI: Supporting Agents for Superior CX**

Transforming customer experience requires more than just adopting AI—it requires empowering your agents to use the technology effectively. In this session, we will discuss how AI can provide actionable insights that help agents work cohesively and resolve customer issues with minimal friction. Discover how data-driven AI can enable smoother, more impactful customer service interactions.

- Best Practices for Coordinating AI and Live Agents Across Channels
- Keys to Overcoming Resistance to AI and Organizational Change
- Insights on ensuring Consistent Customer Experience with AI-Augmented Training



Ian Temprow
COO
IA Solutions

4:45 PM **MASTERCLASS | How to design AI Voice Agents That Are Actually Good**

Most voice bots still sound like... bots. The next generation of AI voice agents must go beyond scripted responses and clunky flows to deliver experiences that feel natural, helpful, and human. This session explores what separates good voice design from bad—covering tone, timing, emotion, and escalation strategy. You'll learn how to train AI to listen as well as it speaks, design for empathy and accuracy, and make automation feel less artificial.



Catheryn Li
Co-Founder & CEO
SIMPLE AI

DAY 2

THURSDAY, OCTOBER 16, 2025

5:45 PM

FIRESIDE CHAT | Designing with Data: Turning Customer Signals into Real Solutions

How do fleeting moments of customer feedback—like a conversation overheard on the subway—turn into scalable, build-ready product concepts? In this fireside chat, leaders from product operations, design, and research walk us through their emerging framework for transforming voice-of-customer data into validated product concepts using AI.

Attendees will get an inside look at how the team is operationalizing a proprietary AI primer to extract sentiment, reduce token limitations, and train narrow models that simulate expert roles (from product owner to designer) in real time. Learn how this cross-functional team validates AI-generated insights, builds feedback loops into design, and pushes AI-informed concepts from exploration to development—all without breaching enterprise data constraints.

You'll leave with a clearer understanding of how to:

- Convert unstructured customer feedback into actionable insight
- Reduce hallucinations by narrowing model focus
- Create feedback loops between operations, design, and research
- Build scalable processes that integrate proprietary AI safely

Moderated by:



Adam Pruitt
 VP, Design & CX
[JP Morgan Chase](#)



Emilio Harrison
 Vice President, UX Research
[JP Morgan Chase](#)



Zach Bolena
 Vice President Accessibility
[JP Morgan Chase](#)

6:30 PM

Boots, Bourbon, & BBQ Networking Reception



BOOTS BOURBON & BBQ

There's no better way to wind down than with the holy trinity of Texas hospitality. Boots, Bourbon & BBQ brings together smoky flavors, smooth pours, and a relaxed, boots-optional vibe. Guests can mingle over slow-cooked brisket, sample small-batch bourbon, and enjoy live country tunes under the glow of string lights. It's a toast to good food, great conversation, and the spirit of the Lone Star State.



DAY 3

FRIDAY, OCTOBER 17, 2025

| | |
|----------|---|
| 9:00 AM | Rise & Shine Breakfast |
| 9:45 AM | INTERACTIVE WORKSHOP Operationalizing Empathy: What Healthcare Can Teach Every Industry <p>In healthcare, empathy isn't a soft skill — it's a survival skill. This hands-on session explores how hospitals train teams to lead with compassion in moments of fear, urgency, and vulnerability — and how those same frameworks can elevate customer experience in any industry.</p> <p>You'll learn how to build emotional intelligence into service design, coach teams to communicate under pressure, and transform “difficult moments” into trust-building opportunities. Through a live role-play and empathy-mapping exercise, participants will practice reframing real-world customer scenarios and walk away with practical tools to operationalize empathy at scale.</p> <div>  <div> <div>David Weisman PhD</div> <div>Chief Experience Officer</div> <div>NYC Health + Hospitals-Queens</div> </div> </div> |
| 9:30 AM | Business Meetings |
| 10:30 AM | Friday Fuel Up Networking Break |
| 11:00 AM | CCW Digital Market Research/ Special Report <div>  <div> <div>Audrey Steeves</div> <div>Managing Director, Digital</div> <div>Customer Management Practice</div> </div> </div> |
| 12:00 PM | Exchange Concludes |

SOLUTIONS HUB

Skip the Vendor Noise—Streamline Your Efforts. Meet the Right Solutions, Tailored to Your Strategic Initiatives.



KEY SOLUTION AREAS



Customer & Employee Feedback,
Voice, and Sentiment Analysis



Journey Mapping, Analytics
& Orchestration



AI, Automation & Self-Service
Enablement



Digital Experience



Reputation, Social Listening
& Brand Management

[LEARN MORE](#)

“

The one-to-one business meetings have really helped me to understand what technology options are out there that we can use to really solve some of the business problems that are plaguing our teams today. Most of the vendors that I talked to were very knowledgeable, they listened to really what the business objectives were, what our business problems were, then they were able to explain how the technology they were offering could really help us to solve those problems.”

- Sr. Director, Product Management,
Marriott International

VENUE & ACCOMMODATION



WELCOME TO DOWNRIGHT AUSTIN

701 E 11th ST, AUSTIN, TX 78701

A boutique hotel located in the heart of downtown Austin, offering a blend of modern luxury and local charm. With stylish, comfortable rooms, an outdoor pool, and a lively bar, it's the perfect spot to enjoy Austin's vibrant culture. Located steps away from popular attractions, dining, and entertainment, Downright Austin provides an ideal base for both leisure and business travelers seeking a unique Austin experience.

Group Rate: \$309

Cut-off date: Tuesday, September 30, 2025

REQUEST AN INVITATION