



September 24-26, 2024

THE EVENT FOR CUSTOMER COMMUNICATION
& DIGITAL EXPERIENCE PROFESSIONALS

Xplor Summit 2024 Agenda

All Dates
9/23-9/26

Monday
9/23

Tuesday
9/24

Wednesday
9/25

Thursday
9/26

September 23, 2024

1:00 PM ET

Xplor Summit Registration Desk Open

1:00 PM-5:00 PM

Other Activities

North Registration Desk

Vendor Forum Move-In (exhibitors only please)

1:00 PM-5:00 PM

Other Activities

International Ballroom

3:00 PM ET

Xplor International Board of Directors Meeting

3:00 PM-5:00 PM

Other Activities

Breakout Room: Jasmine

Speaker Ready Room

3:00 PM-5:00 PM

Other Activities

Breakout Room: Lanai

September 24, 2024

7:00 AM ET

Xplor Summit Registration Desk Open

7:00 AM-5:00 PM

Other Activities

North Registration Desk

7:30 AM ET

Vendor Forum Open

7:30 AM-8:30 AM

Networking/Ve...

International Ballroom

8:00 AM ET

Attendee Beverage Station Open

8:00 AM-10:00 AM

Other Activities

International Ballroom

8:30 AM ET

2024 Xplor Summit Welcome

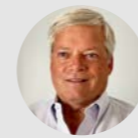
8:30 AM-8:50 AM

General Sessions

International Ballroom



Joanne Gore
President
Joanne Gore Communications ...



Randy Hardy
Senior Consultant
Gimbel & Associates



Skip Henk, EDP
President & CEO
Xplor International

8:50 AM ET

KEYNOTE: Where in the World is Pat McGrew? An Xploring Life!

8:50 AM-9:30 AM

General Sessions

International Ballroom



Pat McGrew, M-EDP, CMP
Managing Director
McGrewGroup, Inc.

9:40 AM ET

KEYNOTE: Using Compassion to Recruit, Retain & Unify the Best of the Best

9:40 AM-10:20 AM

General Sessions

International Ballroom



Ken Leslie
CEO
Ken Leslie Productions

10:20 AM ET

Rapid-Fire Exhibitor Introductions

10:20 AM-10:50 AM

General Sessions

International Ballroom



Joanne Gore
President
Joanne Gore Communications ...



Skip Henk, EDP
President & CEO
Xplor International



Betsy Keplinger, M-EDP, MS
Customer Success Manager
Quadient

11:00 AM ET

The GenAI Revolution in CCM: Current Trends and Future Possibilities

11:00 AM-11:45 AM

Educational Ses...

Breakout Room: Crystal



Mia Papanicolaou
CX & Customer Communicatio...
Chameleon Collective



Liz Stephen
CX & Customer Communicatio...
Chameleon Collective

Accessible High Volume Medicare Document Automation for the PSP

11:00 AM-11:45 AM

Educational Ses...

Breakout Room: Lanai



Christy Bailey Joyner
Director, Client Experience
O'Neil Digital Solutions



Dennis Quon, EDP
Director, Document Accessibili...
Crawford Technologies

How Valuable Are Your Clicks?

11:00 AM-11:45 AM

Educational Ses...

Breakout Room: Veranda



Randy Hardy
Senior Consultant
Gimbel & Associates



Manish Hirapara
CEO
PeakActivity

12:00 PM ET

Xplor Summit Lunch (event badge required)

12:00 PM-1:30 PM

Networking/Ve...

International Foyer & John T's Lounge

LUNCH & LEARN: How to Open a Door...and Successfully Own the Room

12:00 PM-1:30 PM

Educational Ses...

Breakout Room: Crystal



Petra Diener
Founder
3 Across The Sea

Vendor Forum Open

12:00 PM-1:30 PM

Networking/Ve...

International Ballroom

1:30 PM ET

The ADA and Other Critical Legal Issues Impacting Transactional Printers

1:30 PM-2:15 PM

Educational Ses...

Breakout Room: Crystal



Christopher Santomassimo
General Counsel/Partner
OGC Solutions

Transforming the CCM Marketplace

1:30 PM-2:15 PM

Educational Ses...

Breakout Room: Lanai



Kevin McPherson, MBA
Senior Client Executive
Quadient

Mayo Clinic Improves Customer Service and Realizes Thousands in Postal Savings

1:30 PM-2:15 PM

Educational Ses...

Breakout Room: Veranda



Tony Fenner
Manager, eDocument Solutions
Mayo Clinic



Mary Ann Rowan
Chief Experience Officer
Solimar Systems, Inc.

2:15 PM ET

Attendee Beverage Station Open

2:15 PM-4:30 PM

Other Activities

International Ballroom

2:30 PM ET

Digital Transformation & Modernization of Xplor's EDP Certification Program

2:30 PM-3:15 PM

Educational Ses...

Breakout Room: Crystal



Betsy Keplinger, M-EDP, MS
Customer Success Manager
Quadient



Scott Mulkey, M-EDP
COO & Senior Partner
Quantre Solutions

Wow Your Customers with On-Demand Omni-Channel Communications

2:30 PM-3:15 PM

Educational Ses...

Breakout Room: Lanai



Ernie Crawford, M-EDP
President
Crawford Technologies

Innovative Transformations: Leveraging Print to Thrive in the Digital Age

2:30 PM-3:15 PM

Educational Ses...

Breakout Room: Veranda



Denise Miano, M-EDP
Head of Transformation
OSG

3:30 PM ET

From Mail to Digital: Navigating the Future of Customer Communications

3:30 PM-4:15 PM

Educational Ses...

Breakout Room: Crystal



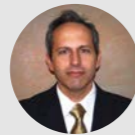
Andy Young
Owner & Principal Analyst
Treeline Research, LLC

The Revolution of End-to-End Communication Processing

3:30 PM-4:15 PM

Educational Ses...

Breakout Room: Lanai



Philip Gyuling
Head of Product Management
Compart



Karen Tremblay
President & CEO
Compart North America, Inc.

Transforming Postal Mail with AI: Strategies for Success

3:30 PM-4:15 PM

Educational Ses...

Breakout Room: Veranda



Joanne Gore
President
Joanne Gore Communications ...



Mike Porter
President
Print/Mail Consultants

4:30 PM ET

PANEL: Integrating AI into CCM: Enhancing Engagement and Efficiency

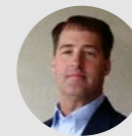
4:30 PM-5:15 PM

Educational Pa...

International Ballroom



Betsy Keplinger, M-EDP, MS
Customer Success Manager
Quadient



Brian Cox
Vice President IT - CCM, Softwa...
RRD



Kevin McPherson, MBA
Senior Client Executive
Quadient

5:30 PM ET

2024 Xplor Industry Awards

5:30 PM-6:00 PM

General Sessions

International Ballroom



Randy Hardy
Senior Consultant
Gimbel & Associates



Skip Henk, EDP
President & CEO
Xplor International



Betsy Keplinger, M-EDP, MS
Customer Success Manager
Quadient

6:00 PM ET

Xplor Summit Social Hour & Vendor Forum Open (event badge or guest ticket required)

6:00 PM-7:00 PM

Networking/Ve...

International Ballroom

September 25, 2024

7:00 AM ET

Xplor Summit Registration Desk Open

7:00 AM-5:00 PM

Other Activities

North Registration Desk

7:30 AM ET

Vendor Forum Open

7:30 AM-8:30 AM

Networking/Ve...

International Ballroom

Career Speed Dating

7:30 AM-8:30 AM

Other Activities

Breakout Room: Crystal



Petra Diener
Founder
3 Across The Sea

8:00 AM ET

Attendee Beverage Station Open

8:00 AM-10:00 AM

Other Activities

International Ballroom

8:30 AM ET

PANEL: Innovations in Enterprise Communication: Bridging Digital and Print for the Future of CCM

8:30 AM-9:15 AM

Educational Pa...

International Ballroom



Begin Thomas
Senior Architect
The Cincinnati Insurance Com...



Ernie Crawford, M-EDP
President
Crawford Technologies



Gary Gregg
Chief Product Officer
OSG

9:30 AM ET

2024 Xplor Communication Design Competition Presentations

9:30 AM-10:25 AM

General Sessions

International Ballroom

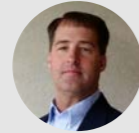
10:30 AM ET

Business Communication Intelligence: Using AI to Drive Content Optimization

10:30 AM-10:55 AM

Educational Ses...

Breakout Room: Crystal



Brian Cox
Vice President IT - CCM, Software Development & BCS Architecture
RRD

Prompting Excellence: Enhancing Communication with AI

10:30 AM-10:55 AM

Educational Ses...

Breakout Room: Lanai



Betsy Keplinger, M-EDP, MS
Customer Success Manager
Quadient

Secure Printing of National Exam Books with JDF Job Tickets and Intelligent Workflow Automation

10:30 AM-10:55 AM

Educational Ses...

Breakout Room: Veranda



Mary Ann Rowan
Chief Experience Officer
Solimar Systems, Inc.

11:00 AM ET

USPS Mitigating Rate Changes and Operational Updates 2.0

11:00 AM-11:45 AM

Educational Ses...

Breakout Room: Crystal



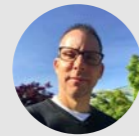
Glen Swyers, MDP
Director of Marketing Integration
The Imagine Group

Orchestrating Seamless Customer Journeys: Leveraging Data-Driven Touchpoints

11:00 AM-11:45 AM

Educational Ses...

Breakout Room: Lanai



Gary Gregg
Chief Product Officer
OSG

Automate Customer Communications: Real-Life Success Stories

11:00 AM-11:45 AM

Educational Ses...

Breakout Room: Veranda



Gina Armada
CEO
MHC

11:45 AM ET

Xplor Summit Lunch (event badge required)

11:45 AM-12:15 PM

Networking/Ve...

International Foyer

12:30 PM ET

Vendor Forum Open

12:30 PM-1:30 PM

Networking/Ve...

International Ballroom

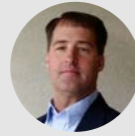
1:30 PM ET

Digital Transformation Powered by Managed Services

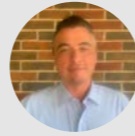
1:30 PM-2:15 PM

Educational Ses...

Breakout Room: Crystal



Brian Cox
Vice President IT - CCM, Softwa...
RRD



Daniel Durie
Chief Technology Officer
OSG



Kevin McPherson, MBA
Senior Client Executive
Quadient

Enabling Seamless Customer Journeys: Transforming Documents into Conversations

1:30 PM-2:15 PM

Educational Ses...

Breakout Room: Lanai



Alan Burger
CEO & Co-Founder
InfoSlips

AI is Off the Chains! Transforming CXM with Innovative AI Solutions

1:30 PM-2:15 PM

Educational Ses...

Breakout Room: Veranda



Scott Mulkey, M-EDP
COO & Senior Partner
Quantre Solutions

2:15 PM ET

Attendee Beverage Station Open

2:15 PM-4:30 PM

Other Activities

International Ballroom

Don't Leave Anyone Behind: Key Facts About Accessibility and Language Translations

2:30 PM-3:15 PM

Educational Ses...

Breakout Room: Crystal



Ligia Mora
Senior Product Manager
Crawford Technologies

Process Excellence in Digital Communications

2:30 PM-3:15 PM

Educational Ses...

Breakout Room: Lanai



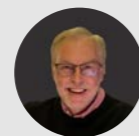
Rob Browne
Senior Manager Project Quality Assurance
Papyrus Software

The "ologies" of Customer Communication Projects: Let's Avoid Failures

2:30 PM-3:15 PM

Educational Ses...

Breakout Room: Veranda



Tim Cooper
Chief Architect
OSG

Workflow to the Rescue: How to Future-Proof Your Operation

3:30 PM-4:15 PM

Educational Ses...

Breakout Room: Crystal



Mark Jorgensen
National Solutions Developme...
Ricoh USA, Inc.



Lois Ritarossi
President
High Rock Strategies

Power Tools for Business: Fast-Track Your Success

3:30 PM-4:15 PM

Educational Ses...

Breakout Room: Lanai



Cheryl James
Fractional Chief Operating Officer
CL James Consulting, LLC

Harnessing Generative AI for Effective Document Design

3:30 PM-4:15 PM

Educational Ses...

Breakout Room: Veranda



Dina Vees
Associate Professor
Cal Poly

4:30 PM ET

PANEL: Future-Proofing CCM: Strategies for Tomorrow's Challenges

4:30 PM-5:15 PM

Educational Pa...

International Ballroom



Joanne Gore
President
Joanne Gore Communications ...



Gina Armada
CEO
MHC



Alan Burger
CEO & Co-Founder
InfoSlips

5:15 PM ET

And the Winner Is...2024 Xplor Communication Design Competition Award Announcement

5:15 PM-5:25 PM

General Sessions

International Ballroom



Skip Henk, EDP
President & CEO
Xplor International



Kevin McPherson, MBA
Senior Client Executive
Quadient

5:25 PM ET

Booth Scramble Prize Drawing

5:25 PM-5:30 PM

General Sessions

International Ballroom



Skip Henk, EDP
President & CEO
Xplor International



Mary Ann Rowan
Chief Experience Officer
Solimar Systems, Inc.

5:30 PM ET

Vendor Forum Open

5:30 PM-6:00 PM

Networking/Ve...

International Ballroom

6:00 PM ET

Xplor Summit Poolside Happy Hour (event badge or guest ticket required)

6:00 PM-8:00 PM

Networking/Ve...

Poolside

September 26, 2024

7:30 AM ET

Xplor Summit Registration Desk Open

7:30 AM-12:00 PM

Other Activities

North Registration Desk

Vendor Forum Open

7:30 AM-9:30 AM

Networking/Ve...

International Ballroom

8:00 AM ET

Attendee Beverage Station Open

8:00 AM-10:00 AM

Other Activities

International Ballroom

8:30 AM ET

Birds of a Feather Roundtables

8:30 AM-9:15 AM

Birds of a Feath...

Breakout Room: Crystal



Pat McGrew, M-EDP, CMP
Managing Director
McGrewGroup, Inc.



Mike Porter
President
Print/Mail Consultants



Begin Thomas
Senior Architect
The Cincinnati Insurance Com...



9:30 AM ET

PANEL: Navigating Compliance in CCM: Practical Insights and Strategies

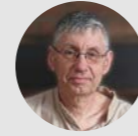
9:30 AM-10:15 AM

Educational Pa...

Breakout Room: Crystal



Pat McGrew, M-EDP, CMP
 Managing Director
 McGrewGroup, Inc.



Jeff DeVoyd
 Enterprise Architect
 Quadient



David Herr
 Vice President of Enterprise Sol...
 Allyant

10:30 AM ET

The Impacts of Accessibility

10:30 AM-10:55 AM

Educational Ses...

Breakout Room: Lanai



David Herr
 Vice President of Enterprise Solutions
 Allyant

Brave New Frontiers of Customer-Centric Digital Transformation in CCM

10:30 AM-10:55 AM

Educational Ses...

Breakout Room: Veranda



Mayank Mital
 Executive Vice President - Americas & EMEA
 FCI CCM, Inc.

11:00 AM ET

2024 Xplor Summit Recap: Looking Back & Moving Forward

11:00 AM-11:45 AM

General Sessions

Breakout Room: Crystal



Skip Henk, EDP
 President & CEO
 Xplor International



Pat McGrew, M-EDP, CMP
 Managing Director
 McGrewGroup, Inc.

11:45 AM ET

2024 Xplor Summit Closing

11:45 AM-12:00 PM

General Sessions

Breakout Room: Crystal



Joanne Gore
President
Joanne Gore Communications ...



Skip Henk, EDP
President & CEO
Xplor International

12:00 PM ET

Vendor Forum Move-Out (exhibitors only please)

12:00 PM-2:00 PM

Other Activities

International Ballroom

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