AI agent & copilot SUMMIT NA

March 17-19, 2025
Hilton La Jolla Torrey Pines
San Diego, CA

KEYNOTE & FEATURED SPEAKERS

Ray Smith
VP, AI Agents
Microsoft

Bryan Goode
Corporate Vice President
Microsoft

Christopher Lochhead
Best-Selling Author
CATEGORY PIRATES

Lambert Hogenhout
Chief AI & Data, United Nations
UNITED NATIONS

Kirstie Tiernan
Board of Directors, BDO
BDO

Cecilia Flombaum
Office of the CTO, Bus & Ind Copilots
Microsoft

50+ Speakers | 60+ Sessions | 15+ Partners

2025 AI AGENT & COPILOT SUMMIT NA

SHOW GUIDE

Defining the opportunities, impact, and outcomes possible with Microsoft Agents & Copilot for business & technology leaders at mid-market and enterprise companies.

MSDW
MSDynamicsWorld

Only Copilot Fans

Official Media Partners

John Siefert

CEO, Dynamic Communities
& Cloud Wars

Welcome Message

Welcome to AI Agent & Copilot Summit, we are so glad you are a part of the inaugural event to define the opportunities, impact, and outcomes possible for mid-market and enterprise companies with Microsoft Agents & Copilot.

A few things to know as you dig into the agenda, the experience, and the people you will engage with this week:

1. The entire program for this event was created by a Programming Committee Board, with representation from Microsoft, mid-market & enterprise business & technology executives, Microsoft MVPs, academia, and leading partners in the Microsoft ecosystem. This is special for two reasons: (1) it is truly a community event built by community members and (2) there is a diverse agenda of keynotes, panel discussions, and fireside chats, followed by masterclass breakout sessions you can pick and choose from.

2. We have over 50 speakers that represent the entire Microsoft AI community, including executives and product experts from Microsoft, business and AI pioneers from mid-market and enterprise companies, Microsoft AI & Copilot MVPs, and leading partners with burgeoning AI practices.

3. 60+ educational sessions across the main stage and through masterclass breakouts, there is something for everyone in our Microsoft AI and Business Applications community to engage with and learn from.

4. Receptions on Monday and Tuesday evening feature food, drinks and incredible networking opportunities to connect with peers, speakers, and the partners who can help make your AI vision a reality.

5. Please remember that all your meals are included in your All-Access Pass, so please join in for breakfast, lunch, coffee breaks and more!

We will look forward to hearing your feedback and thoughts during and after the event, as we start planning our 2026 edition of the Southern California AI Agent & Copilot Summit.

John Siefert

17
MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

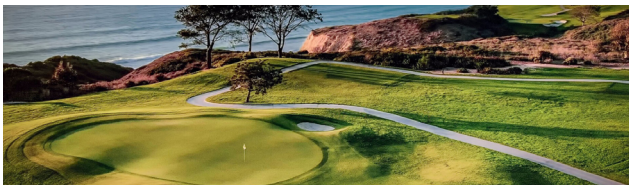# Golf Invitational & Opening Reception

Golf Invitational

AI Agent & Copilot Invitational at Torrey Pines

Presented by BDO, this exclusive AI Agent & Copilot invitational golf tournament takes place at Torrey Pines Golf Course, which overlooks the Pacific Ocean and hosts the PGA TOUR's Farmers Insurance Open.

copilot
TORREY PINES INVITATIONAL
3/17/25 AI Copilot Summit NA
presented by BDO

Details

1. Shotgun start at 7:00 am on Monday March 17th
2. 72 player capacity
3. Breakfast served at 6:00 am
4. Awards and Luncheon at Noon

Opening Reception

Drinks, Food, Networking & Christopher Lochhead

Dynamic Communities CEO John Siefert and Bob Evans of Cloud Wars are joined by best-selling author and podcaster Christopher Lochhead to discuss creating a legendary career in a post-AI world.

🕐 **Monday, March 17**
📅 **4:00 PM - 6:00 PM PST**
📍 **Parterre Garden**

How to Create a Legendary Career in a Post-AI World

Bob Evans
Founder at Cloud Wars

Christopher Lochhead
Best-Selling Author at Category Pirates

John Siefert
CEO at DCI & Cloud Wars

AI Agent & copilot SUMMIT NA

March 17-19, 2025
Hilton La Jolla Torrey Pines
San Diego, CA

AI Agent & Copilot Summit
SPONSORS

BDO
BDO
Golf Invitational Sponsor

Alithya
Alithya

alpha bold
alpha bold

argano
argano

armanino
armanino

boyer..
Boyer & Associates

C5insight
WORK. TOGETHER. BETTER.
C5 Insight

data courage / xe
Data Courage / xe

DynaTech | Systems
DynaTech Systems

forvis mazars
Forvis Mazars

Hso
HSO

leapwork
Leapwork

LUDIA CONSULTING
Your physical operations partner.
Ludia Consulting

MCA CONNECT™
MCA Connect

ps hummingbird
A company of publicis sapient
ps hummingbird

RSM
RSM

sa.global
AGILE. CAPABLE AND COMMITTED
sa.global

18 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Keynotes & Main Stage Program

7:00 AM - 5:00 PM
Registration Open

7:00 AM - 8:30 AM
Breakfast

8:30 AM - 9:15 AM
Keynote: How AI Agents are Defining the Future, With Microsoft VP of AI Agents Ray Smith

Ray Smith
VP, AI Agents, Microsoft

9:15 AM - 9:30 AM
Keynote: Fireside Chat with Microsoft Partner Alithya

Jason Wickman
CE & Digital Microsoft Practice, Alithya

Harnessing AI to Unlock Greater Value From Your Business Applications

9:30 AM - 10:00 AM
From Board Members to Staff, How to Set Organizational Priorities for AI Success

Kirstie Tiernan
Board of Directors, BDO

10:00 AM - 10:15 AM
Coffee Break & Networking

10:15 AM - 10:45 AM
Building AI Literacy

Brent Wodicka
CTO, AIS

Prashant G. Bhoyar
AI Architect-Office of CTO, AIS

10:45 AM - 11:15 AM
How Agents & Copilots are Redefining the Value of Dynamics 365

Cecilia Flombaum
Office of the CTO - Business & Industry Copilots, Microsoft

11:15 AM - 11:45 AM

Industry AI Panel: How Industry-Centric AI Use Cases are Accelerating Innovation and Streamlining Supply Chains

S. David Brown
CIO, National Power

Tom Gerdes
CIO, The Heico Companies LLC

Kenny Mullican
CIO, Paragon Films, Inc

Tony Uphoff
CEO, Pipeline360

11:45 AM - 12:15 PM

How PriceSmart Executive Leadership Aligns Business and Tech Strategy Around AI

Francisco Velasco
EVP & Chief Legal Officer
at PriceSmart

David Price
EVP & Chief Transformation Officer
at PriceSmart

Wayne Sadin
EVP & CIO at PriceSmart

12:15 PM - 1:30 PM

Luncheon and Networking on Show Floor

5:00 PM - 7:00 PM

Cocktail and Dinner Reception on Show Floor

5:30 PM - 6:00 PM

Fireside Chat with Marshall Toplansky & Bob Evans

Marshall Toplansky
The Innovation Professor, Argyros School of Business and Economics, Chapman University

Bob Evans
Founder, Cloud Wars

18 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

AI Solution Showcases

1:30-2:00 pm

AI Solution Session	Speakers	Partner	Room
AI Financial Insights in Dynamics 365 Business Central	**Kamil Karbowiak** Managing Director, Data Courage **Tristan Threlkeld** Director of Sales and Partnerships, Data Courage	data courage	Fairway III
How to Automate Copilot Testing	**Asaf Shaked** Senior Solutions Engineer - Partners & Alliance, Leapwork	leapwork	Scripps I
From Hours to Minutes: Real-World AI Wins with Copilot	**Ryan Grant** CRO, Americas at sa.global	sa.global AGILE, CAPABLE AND COMMITTED	Fairway IV
Get AI Ready: Creating a Copilot Roadmap	**Trica Desso-Cox** Managing Director – EOS Integrator, C5 Insight **Traci Winter** Senior Director, Business Consulting, C5 Insight	C5insight WORK. TOGETHER. BETTER.	Fairway II
Prepare for AI with a Modern Data Platform	**Dag Calafell** Director, Technology Innovation, MCA Connect	MCA CONNECT™	Scripps II
Revolutionizing Dynamics 365 with Copilot: Faster, Smarter, More Cost-Effective Implementations	**Lucas Diaz** CEO, Ludia Consulting **Rachel Profitt** Principal Program Manager, Microsoft	LUDIA CONSULTING	Fairway I

18 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

AI Data Readiness Masterclass

Speakers & Schedule

ROOM: FAIRWAY I

2:00 PM - 2:45 PM

Creating a Data Strategy & Framework for AI Readiness

Michael Simms
VP Data & AI, Columbus

Yogi Naik
Principal Group Product Manager, Dataverse & Power Platform, Microsoft

2:45 PM - 3:05 PM

Coffee Break & Networking

3:05 PM - 3:50 PM

Transforming Your Data Estate into a Goldmine with MS Fabric

Nancie Calder
Global D365 CE Practice Lead Exec, Avanade

Will Hawkins
Lead AI Engineer & Founder, RitewAI

3:50 PM - 4:10 PM

Coffee Break & Networking

4:10 PM - 4:55 PM

Quantifying the Value of AI: Metrics that Matter for Business Impact

Kanwal Khipple
CEO, 2toLead

18 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Building Agents & Copilots in Copilot Studio & Azure AI Foundry Masterclass

Speakers & Schedule

ROOM: SCRIPPS I

2:00 PM - 2:25 PM

Copilot Case Studies: Profiles in Transformation

Joel Oleson
Senior Enterprise Solution Architect, Sony Interactive Entertainment

Geoff Ables
Managing Partner, C5 Insight

Kenny Mullican
CIO, Paragon Films, Inc

2:25 PM - 2:40 PM

Coffee Break & Networking

2:40 PM - 3:25 PM

Master Class on Building AI Agents and Copilots with Copilot Studio

Dewain Robinson
Principal Program Mgr, Microsoft

3:25 PM - 3:40 PM

Coffee Break & Networking

3:40 PM - 4:05 PM

Empowering Businesses with AI Agents: Harnessing Microsoft Copilot & Azure AI Foundry

Samiullah Khan
Senior Practice Manager AI & IoT, AlphaBOLD

Brian Ashbrook
Director of Business Applications, AlphaBOLD

4:10 PM - 4:55 PM

Empower Your Enterprise: Building an AI Copilot for Operations

Chris Savage
CTO, The Henson Group

Responsible AI & Cybersecurity Masterclass

Speakers & Schedule

ROOM: SCRIPPS II

2:00 PM - 2:45 PM

Integrating Copilot in Your Business the Right Way: A Responsible AI Playbook

Marie Wiese
CEO, Marketing Copilot

2:45 PM - 3:05 PM

Coffee Break & Networking

3:05 PM - 3:50 PM

What Does Copilot Know about Me and My Data

Cole Haddock
Solutions Architect , Vanguard

Sebastian Sieber
Director of Product Development, proMX

3:50 PM - 4:10 PM

Coffee Break & Networking

4:10 PM - 4:55 PM

AI and Security, Legal Challenges & Policy Considerations

Nathan Bensch
VP, Microsoft Enterprise Services, envista

Corey Hlavacek
Information Security Officer, envista

18 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Using Agents & Copilots in D365 Business Central Masterclass

Speakers & Schedule

ROOM: FAIRWAY II

2:00 PM - 2:45 PM

Copilot Studio: Build Your Own Copilot Connected to Business Central (No PhD Needed!)

AJ Ansari
COO, DSWi

2:45 PM - 3:05 PM

Coffee Break & Networking

3:05 PM - 3:50 PM

Is Copilot Enough? Advancing AI in Business Central

Kamil Karbowiak
Managing Director, Data Courage

Tristan Threlkeld
Director of Sales and Partnerships,
Data Courage

3:50 PM - 4:10 PM

Coffee Break & Networking

4:10 PM - 4:55 PM

Leverage AI and Copilot in Dynamics 365!

Trish Boccuti
Director of Customer Success
at Innovia

S. David Brown
CIO at National Power

18 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Using Agents & Copilots in M365 Modern Work Masterclass

Speakers & Schedule

ROOM: FAIRWAY IV

2:00 PM - 2:25 PM

Copilot and Your Data - Boost Productivity with SharePoint Agents

Eric Overfield
CIO, Creospark

2:25 PM - 2:35 PM

Coffee Break & Networking

2:35 PM - 3:00 PM

Leveraging Copilot in Microsoft Teams for Real World Impact

Maddy Dahl
Training & Adoption Specialist, RSM

3:00 PM - 3:25 PM

Microsoft Copilot: From Experimentation to Habits for Daily Use

Molly Rupert-Sullivan
Global Adoption Lead - Microsoft Copilot & Gen AI, Accenture

3:25 PM – 3:40 PM

Coffee Break & Networking

3:40 PM - 4:05 PM

Creating a Copilot Center of Excellence

Geoff Ables
Managing Partner, C5 Insight

Tricia Desso-Cox
Managing Director – EOS Integrator, C5 Insight

4:10 PM - 4:35 PM

Extending M365 Copilot with Copilot Studio

Dag Calafell
Director, Technology Innovation, MCA Connect

Drew Clark
Presales Solution Architect, MCA Connect

4:35 PM - 5:00 PM

10 Things I Wished I Knew Before Rolling Out Microsoft Copilot

Sebastian Sieber
Director of Product Development, proMX

18
MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Using Agents & Copilots in Power Platform Masterclass

Speakers & Schedule

ROOM: FAIRWAY III

2:00 PM - 2:25 PM

Getting Started With Copilot in Power Platform

Eric Flamm
Consultant, Flamm Consulting

2:25 PM - 2:40 PM

Coffee Break & Networking

2:40 PM - 3:25 PM

6 Keys to Empowering Digital Innovation Using Microsoft's Power Platform

Victor Dantas
Director, Eyedeas

3:25 PM - 3:40 PM

Coffee Break & Networking

3:40 PM - 4:05 PM

Harnessing AI-Powered Assistance in Enterprise Solutions: The Future of Work with Microsoft Copilot

Scott LeFante
Director, Ludia Consulting

4:10 PM - 4:55 PM

Empowering Business Transformation with Copilot Studio and Power Platform

Senthamil Selvan
Power Platform Consultant, Acumant

---

19 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Keynotes & Main Stage Program

7:00 AM - 9:00 AM
Registration Open

7:00 AM - 8:30 AM
Breakfast

8:30 AM - 9:00 AM
Keynote: How Agents & Copilots are the Business & Industry Reimagination Machine

Bryan Goode
CVP, Business Applications, Microsoft

Bob Evans
Founder, Cloud Wars

9:00 AM - 9:15 AM
Keynote Fireside Chat with sa.global CEO Stephen James

Stephen James
CEO, sa.global

John Siefert
CEO, DCI & Cloud Wars

9:15 AM - 9:45 AM
Presenting the AI Use Case: How to Speak the Language of the C-Suite and Board of Directors

Diane Gardner
Independent Advisor,
Two Pillars Advising LLC

9:45 AM - 10:15 AM
Better Together: When and How to Build Agents Leveraging the Best of Copilot Studio and Azure AI Foundry

Prashant G. Bhoyar
AI Architect-Office of CTO, AIS

Dewain Robinson
Principal Program Mgr, Microsoft

10:15 AM - 10:30 AM
Coffee Break & Networking

10:30 AM - 10:45 AM
Artificial Intelligence for Authentic Inclusion

Shayna Robinson
CEO, Circle of Friends

Keynotes & Main Stage Program

10:45 AM - 11:15 AM

Co-Creating Agents and Copilots with Vixxo and Microsoft Partner

Lucas Diaz
CEO, Ludia Consulting

Bobby Hunnicutt
VP IT, Vixxo

Jim McCarthy
COO, Vixxo

11:15 AM - 11:30 AM

Fireside Chat: Data Innovation Profile

Miyoshi Tokuno
Director of Data Control, Mad Engine

Michael Simms
VP Data & AI, Columbus

11:30 AM - 1:00 PM

Luncheon and Networking on the Show Floor

4:00 PM - 4:30 PM

Closing Keynote: United Nations' Lambert Hogenhout: How to Survive AI as Companies and Humans

Lambert Hogenhout
Chief Data & AI

19 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Data Modernization With AI Masterclass

Speakers & Schedule

ROOM: FAIRWAY I

1:00 PM - 1:25 PM

Image Tagging AI Case Study: A Customer Story

Miyoshi Tokuno
Director of Data Control, Mad Engine

Michael Simms
VP Data & AI, Columbus

1:25 PM - 1:40 PM

Coffee Break & Networking

1:40 PM - 2:25 PM

Using Copilot Agents to Chat with Your Structured and Unstructured Data

Mitchell Mathews
AI Functional Lead, Crowe LLP

Jack Fallon
AI Transformation Consultant, Crowe LLP

Zach Bernstein
AI Transformation Senior Consultant, Crowe LLP

2:25 PM - 2:40 PM

Coffee Break & Networking

2:40 PM - 3:05 PM

Maximizing Retention and ROI with Fabric AI for Churn Prediction

Zain Baquar
Lead Technical Consultant, HSO

Asad Mahmood
Vice President, Data Analytics, HSO

3:10 PM - 3:55 PM

Grounding Copilot with Your Data: Harnessing the Power of Graph Connectors and Plugins

Kanwal Khipple
CEO, 2toLead

19
MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Using Agents & Copilots in D365 Finance & Operations/SCM Masterclass

Speakers & Schedule

ROOM: FAIRWAY II

1:00 PM - 1:45 PM
Copilot and D365 Finance and Supply Chain

Jason Greene
Digital Principal, BDO

1:45 PM - 2:00 PM
Coffee Break & Networking

2:00 PM - 2:45 PM
Conversational AI for Order Tracking Using Dynamics 365 Finance & Supply Chain Management

Corey Bakhtiary
Sr Director Strategy & Innovation, Argano LLC

2:45 PM - 3:00 PM
Coffee Break & Networking

3:00 PM - 3:45 PM
Accelerating Data Migration with AI Agents

Jim Bretschneider
Executive Vice President, HSO

Asad Mahmood
Vice President, Data Analytics, HSO

Building Agents & Copilots in Copilot Studio & Azure AI Foundry Masterclass

Speakers & Schedule

ROOM: SCRIPPS I

1:00 PM - 1:25 PM

Step Into the Future: Copilot Agents

Geoff Ables
Managing Partner, C5 Insight

1:25 PM - 1:40 PM

Coffee Break & Networking

1:40 PM - 2:25 PM

Copilot Studio Best Practices and Use Cases

Dewain Robinson
Principal Program Mgr, Microsoft

2:40 PM - 3:05 PM

Building a Chatbot? Should You Go with Copilot Studio, Azure OpenAI Service, or Custom GPT?

AJ Ansari
COO, DSWi

3:10 PM - 3:55 PM

The Fusion of Azure AI and Microsoft's Technological Ecosystem

Senthamil Selvan
Power Platform Consultant, Acumant

Using Agents & Copilots in M365 Modern Work Masterclass

Speakers & Schedule

ROOM: FAIRWAY IV

1:00 PM - 1:45 PM

Let's Talk M365 Copilot Adoption, Armanino's M365 Cosmic Copilot Adventure

Gina Montgomery
Director of AI, Analytics & Automation, Armanino

1:45 PM - 2:05 PM

Coffee Break & Networking

2:05 PM - 2:50 PM

Prompt Engineering Across Domains with Copilot for M365

Anupama Natarajan
Data and AI Consultant, Pearl Innovations Limited

2:50 PM - 3:10 PM

Coffee Break & Networking

3:10 PM - 3:55 PM

How AI Revolutionizes the Sales & Marketing Function

Marie Wiese
CEO, Marketing Copilot

19 MARCH

Hilton La Jolla
Torrey Pines
San Diego, CA

Using Agents & Copilots in Power Platform Masterclass

Speakers & Schedule

ROOM: FAIRWAY III

1:00 PM - 1:45 PM

5 Game-Changing Use Cases: Leveraging AI Models in Power Platform Solutions

Mary Myers
Chief Maximizer, WorldMax

1:45 PM - 2:05 PM

Coffee Break & Networking

2:05 PM - 2:50 PM

RAG Models How to Design and Build Usable Generative AI Bots

Alex Drozd
VP of Partnerships, Sparkhound

Matt Meyer
Director-Technology Evangelist, Sparkhound

2:50 PM - 3:10 PM

Coffee Break & Networking

3:10 PM - 3:55 PM

AI Builder in Action: Smart Contract Automation with AI and Power Platform

Zach Bernstein
AI Transformation Senior Consultant, Crowe LLP

Jack Fallon
AI Transformation Consultant, Crowe LLP

Mitchell Mathews
AI Functional Lead, Crowe LLP

COMMUNITY SUMMIT

Orlando
summitna.com

OCTOBER 19-23, 2025

Microsoft Dynamics, AI & Power Platform User Training

Why Attend

Tech Medic Help Desks
Expert users per Microsoft Dynamics & Power Platform products to answer questions & solve problems

500+ Speakers
Microsoft expert users to deliver tips, tricks, how-to & tutorial sessions across 600+ sessions

Meals Included
All meals and receptions included in your pass

5,500+ Attendees
Microsoft users across finance, IT, business admin, supply chain, sales & operations

260+ Partners
Access to trusted Microsoft consultant, systems integrator & ISV Partners on the show floor

Microsoft Leadership
Keynotes, General Sessions and training from Microsoft leadership in AI, Dynamics, Power Platform, Fabric & more.