

# AGENDA

The New Economics of Financial Services CX: From Insights to Impact: An  
Executive Leadership Forum

## Executive Event

### SPEAKERS



**Dmitry Binkevich**  
Global Head of  
Industries  
[Qualtrics](#)



**Tej Luthra**  
Global Head - Data & AI |  
Specialists Solutions  
Architecture | AWS  
Industries  
[AWS](#)



**Ilana Boyum**  
XM Solutions Strategist  
[Qualtrics](#)



**Max Waldron**  
Partner  
[Bain & Company](#)



**Nicki Brooks**  
Director, Global Segment  
Marketing Lead, Data &  
Research  
[S&P Global](#)



**Alessandro Petroni**  
Head of data engineering  
[The clearinghouse](#)

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**November 18, 2025**  
Eastern Time

**Lunch & Registration**

**12:30 PM-1:20 PM**

**Opening Remarks**

**1:20 PM-1:30 PM**

# The New Economics of Customer Experience in Financial Services

1:30 PM-2:15 PM

Explore how leading financial institutions are redefining customer experience transformation using AI-driven engagement strategies. Learn about the new rules of engagement and the financial opportunity to getting this right.

## PANELISTS



Speaker

Max Waldron

Partner

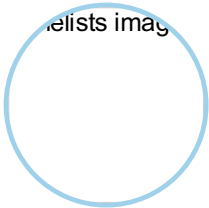
Bain & Company

# Accelerating CX Innovation: AI-Powered Experience Management in Action

2:15 PM-3:15 PM

Learn how Fiserv leverages AWS's machine learning capabilities and Qualtrics' experience management platform to unlock deeper customer insights and drive personalization at scale.

## PANELISTS



Speaker

Tej Luthra

Global Head - Data & AI  
| Specialists Solutions  
Architecture | AWS  
Industries  
AWS



Speaker

Ilana Boyum

XM Solutions Strategist  
Qualtrics

# Networking Break

3:15 PM-3:30 PM

# Orchestrating Enterprise-Wide CX Transformation

3:30 PM-4:15 PM

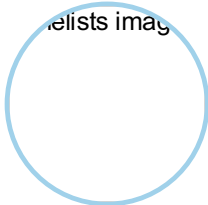
Senior leaders share practical strategies for driving organizational change, breaking down silos, and creating a customer-centric culture. Discussion will focus on overcoming common barriers and measuring transformation success.

## PANELISTS



Chair

Dmitry Binkevich  
Global Head of  
Industries  
Qualtrics



Speaker

Tej Luthra  
Global Head - Data & AI  
| Specialists Solutions  
Architecture | AWS  
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AWS



Speaker

Ilana Boyum  
XM Solutions Strategist  
Qualtrics



Speaker

Max Waldron  
Partner  
Bain & Company

## Final Thoughts

4:15 PM-4:30 PM

## Cocktail Reception

4:30 PM-5:30 PM

## TOGETHER WITH

