

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](#)

[CLICK HERE TO REGISTER](#)



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

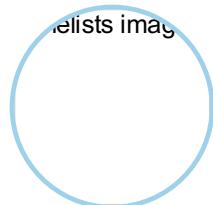
Bain & Company

Accelerating CX Innovation: AI-Powered Experience Management in Action

2:15 PM-3:15 PM

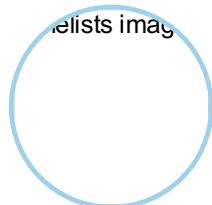
Learn how [Fiserv](#) leverages AWS's machine learning capabilities and Qualtrics' experience management platform to unlock deeper customer insights and drive personalization at scale.

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



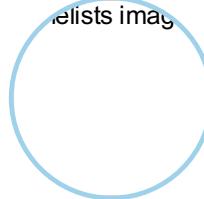
Chair

Dmitry Binkevich
Global Head of
Industries
Qualtrics



Speaker

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

