

# 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 Quality  
Engineering - Fraud  
Payment Services  
The Clearing House

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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

1:30 PM-2:15 PM

## Financial Services

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



**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.

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[AWS](#)



**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.

## CHAIR



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

## PANELISTS



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Partner  
[Bain & Company](#)

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**Final Thoughts**

4:15 PM-4:30 PM

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**Cocktail Reception**

4:30 PM-5:30 PM

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TOGETHER WITH



qualtrics.<sup>XM</sup>

