

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 product data
quality 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

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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Tej Luthra

Global Head - Data &
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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
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Partner
[Bain & Company](#)

Final Thoughts

4:15 PM-4:30 PM

Cocktail Reception

4:30 PM-5:30 PM

TOGETHER WITH



qualtrics.^{XM}

