

5th Annual



Customer
Experience for
Financial
Services

October 1 & 2, 2024

Toronto Marriott City Center
Toronto, ON

**UNLOCKING THE
CX PUZZLE IN
NORTH AMERICA:
TOP FINANCIAL
BRANDS SHARE
EXPERT INSIGHTS
ON ENGAGEMENT
AND INNOVATION**



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Customer Experience for Financial Services Summit



#CXFS2024

Customer Experience for Financial Services Summit

The Customer Experience for Financial Services Summit is the premier event for tackling CX challenges in financial institutions. Featuring CX experts from top North American financial brands, this summit covers hybrid digital strategies, AI-integrated processes, and composable UX strategies to enhance decision-making and customer data management.

Network with leaders from banks, credit unions, insurers, investment banks, and fintechs through interactive sessions and curated breakout learning. Get answers to critical questions on digital horizons, customer journey optimization, AI data analytics, data security, and chatbots.



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Elevate Your CX Strategy: Insights, Innovation, and Networking



1

STRENGTHEN YOUR CX STRATEGY:

Design a visual map of the customer journey to translate data insights and create personalized interactions at every stage.

DRIVE BUSINESS FORWARD:

Fuel higher customer retention by identifying new segments and fortifying retention strategies. Boost brand reputation and recurring revenue through innovative CX programs.

2



3

NETWORK WITH INDUSTRY LEADERS:

Engage with top thought leaders and seasoned CX thinkers from world-class financial institutions, including BlackRock, Goldman Sachs, TD, Scotiabank, Horizons ETFs, Coast Capital Savings, and many more.



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CXFS 2024: What's New and Exciting!

2-Track Summit: Cutting-Edge CX Insights

- AI/ML: Create products with synthetic customers.
- Security-Centric CX: Protect reputation with risk management and analytics.
- Digital Reinvention: Turn chaos into control with digital transformation.
- Evolved Omni-Channel: Innovate with predictive modeling.
- CX Value (CXV): Predict behaviors with early user research.
- Persona-Based Personalization: Enhance content with user research.
- Channel Strategy: Optimize channels with demographic profiling.

Facilitated Roundtables:

Share challenges and best practices with CX peers. Explore fraud prevention, digital CX, customer intelligence, retention strategies, and next-gen insights. Foster connections and innovate solutions.

Interactive Q&A:

Engage Directly with Experts - Seek clarification and delve deeper into topics. Gain personalized insights and advice. Get answers to all your questions. Enhance your understanding and knowledge acquisition.

Speed Networking:

Fast-Paced Connections - Expand your professional network, open doors to new collaborations, and build community with industry leaders. Cultivate relationships, growth, and knowledge exchange.



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NOW**



Featured Speakers

... AND MANY MORE!



KASHMERA SELF

Vice President
Strategy Innovation
Interac



NAZIA SHAHRIN

Vice President
Architecture
Data Governance & Data
Protection
Fidelity Investments



MATTHEW WILLIAMS

Vice President
Goldman Sachs



JACK JONES

Vice President
Digital & Technology Platforms
Vancity



HARVEER SINGH

Chief Data Officer
Truist



TAMMY CASH

Head of Marketing Americas
Vanguard Canada



VINCENZO CIAMPI

Senior Vice President
Global Client Experience
IA Financial Group



ERIC WALKER

Vice President
Head of Customer Management
CapitalOne



MATTHEW BECKMAN

Vice President
Head of Digital Platform
US Bank



ANDREW RUSK

VP Marketing
Coast Capital Savings



MATTHEW SEAGRIM

Chief Digital and Marketing Officer
Meridian Credit Union



SANDIP CHAUDHRY

VP
Customer Growth
RBC



KIRSTIN SONIUS

Vice President
Meridian Credit Union



SABRINA NG

Head of Business Banking
Analytics & Insights
TD



JEFF LUCYK

VP, Head of Sales
Horizons EFT's





Who Attends?



AGENDA - DAY 1

Tuesday, October 1, 2024

7:30 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **CX financial leaders**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices** and prepare for the day ahead.

8:40 AM OPENING COMMENTS FROM YOUR HOST

CX as an industry, career and function is in the midst of the biggest transition ever seen. While the objectives are still focused on creating better customer experiences to drive better results, traditional activities, technology and dependencies are up in the air. We'll talk throughout the conference about this new era of CX, but in the opening comments we will address:

- The explosion of data dependency
- The sourcing and solutions for customer experience today
- The evolution (or destruction) of CX

Sean Albertson, CEO, **CX4ROCKS**

9:00 AM ICE BREAKER PANEL: CUSTOMER JOURNEY OPTIMIZATION

How to Successfully Utilize Cutting-Edge Technology and Intelligence for CX Solutions

Combining the human touch with technologies such as chatbots and voice recognition is important to create a smooth and seamless customer journey. Automate data sourcing and lead enrichment to improve predictive modelling and customer reach. Take away specific solutions to:

- Leverage the omnichannel path to provide a unified user experience
- Implement internal strategies to organize and focus your teams when implementing new platforms
- Observe trending tech in CX in banking

Optimize your customer engagement to personalize customer experiences.

Sabrina Ng, AVP, Business Intelligence Practice, **TD**

Haris Azmi, Chief Revenue Officer, **Sogolytics**

Sean Albertson, CEO, **CX4ROCKS** **MODERATOR**

9:30 AM TECH KEYNOTE PANEL: WHY CX IS CRITICAL IN A DIGITAL-FIRST FIN SERV LANDSCAPE

How to Meet Expectations of Ever-Changing Customer Demands

Consumer habits and interactions with financial services have evolved significantly over the past 5 years. Should financial services emulate big tech customer experiences, or is a different approach required? Master the success factors to:

- Maintain customer service at scale as your customer base grows
- Embed omnichannel strategies now, as the need is imminent
- Help FIs improve experiences and open new opportunities through 'voice of the customer'

Achieve a seamless customer journey to enhance customer satisfaction and loyalty in 2025 and beyond.

Harveer Singh, Chief Data Officer, **Truist**

Judy Bloch, VP, Industry Executive Advisor, Financial Services, **Medallia**

Sean Albertson, CEO, **CX4ROCKS**

10:00 AM INDUSTRY EXPERT: CUSTOMER INTELLIGENCE

Transform your Data Strategy to Drive Results Across the Customers' Journeys

In this session, we'll explore the changing world of Customer Experience (CX). As traditional methods lose effectiveness, CX leaders face the challenge of staying at the forefront of customer insights. Today's customers make decisions based on how they feel during interactions with a brand, so understanding these emotions is key to building stronger relationships and driving loyalty. To lead in CX, it's crucial to access and analyze real-time data. Together, we'll explore the tools and strategies that empower CX leaders to create lasting, impactful experiences for their customers.

What you'll learn from this session:

- How transformational businesses today integrate behavioral AND emotional data at scale
- How to effectively turn data into prioritized actions
- How customer intelligence platforms overcome the growing challenges for CX teams

Jason Ten-Pow, CEO, Founder, **BespokeCX**

Sean Albertson, CEO, **CX4Rocks** **MODERATOR**

10:30 AM SPEED NETWORKING! → MAKE MEANINGFUL CONNECTIONS

Grow your network by meeting like-minded individuals to share your latest ideas and projects with:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a **fun and agile fashion**.
- **Join a community** of CX experts and gain invaluable support.



AGENDA - DAY 1

Tuesday, October 1, 2024

10:45 AM EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest **CX technology** and strategies with our leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

11:15 AM INDUSTRY EXPERT: ARTISANS VS LABORERS

The Future of Customer Experience in Financial Services

In the rapidly changing world of financial services, the distinction between artisans and labourers is reshaping the future of customer experience. This keynote delves into the historical roots of efficiency through Frederick Taylor's Theory of Scientific Management and its influence on labour dynamics. As the financial industry grapples with labour market shortages and margin pressures, a transformative approach becomes imperative. Take away actionable strategies on:

- How AI is poised to revolutionize customer experience for financial services, moving beyond traditional labour to create a future where technology empowers personalized, high-quality interactions.
- How financial institutions on a journey from outdated practices a new era of AI-driven customer experience excellence.

Dan Rood, Chief Marketing Officer, **ASAPP**

11:45 AM INDUSTRY EXPERT: CUSTOMER DIGITAL DATA & CUSTOMER EXPERIENCE

How Online Data and Customer Experience are Indisputably Linked

Online data and customer experience are intertwined. Deliver unique, compelling, and personalized experiences by leveraging data collected throughout your customer's end-to-end digital journey. Walk away with an action plan to:

- Implement a customer-driven data blueprint to streamline complex data flows supporting all interactions
- Identify the key enablers of data-driven customer experiences
- Pave a clear path to CX that maximizes value at the intersection of customer and business needs

Optimize your customer digital data to its fullest potential to drive sustainable value.

Joseph Crawford, VP of Enterprise Monitoring and Data Analytics, **Citi**

Sean Albertson, CEO, **CX4ROCKS** MODERATOR

12:15 AM INDUSTRY EXPERT: DEVELOPING HUMAN-CENTRIC MOBILE EXPERIENCES

Lessons from Leading Banking Apps

In today's fast-evolving digital landscape, delivering an exceptional mobile experience has become a critical differentiator for financial institutions aiming to drive customer engagement and primacy. In this session, we will dive into the findings of an in-depth study that examined over 20 mobile banking apps, including an extensive engagement with a leading North American Bank.

- Leverage mobile technology to enhance customer satisfaction and gain practical insights into staying ahead of the curve.
- Integrate AI into all aspects of mobile development, implement service design for seamless user journeys, and effectively tackle the multi-platform challenge.
- Adopt journey-based operating models to help your organization deliver consistent, high-quality experiences that meet customer needs across channels.

Ian Humphreys, Partner, **EY Design Studio**

Dana Ohab, Partner, EY Artificial Intelligence and Data Financial Service/Pensions Leader

12:45 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest issues in CX specific to financial services**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **customer experience colleagues**.

1:30 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

TRACK 1: STRATEGIC CX

1:45 PM SPOTLIGHT: ROADMAP FOR GEN AI IMPLEMENTATION

Align Your GenAI Initiatives with Your Strategic Business Objectives

TRACK 2: TECHNICAL CX

1:45 PM SPOTLIGHT: EMPLOY STRATEGIES TO INCREASE MARKET SHARE

Plan for VUCA' (volatility, uncertainty, complexity, and ambiguity) with the key takeaways being:



AGENDA - DAY 1

Tuesday, October 1, 2024

Implementing Gen AI solutions and overcoming multiple roadblocks and challenges to execution is now significant more than ever. Overcome the challenges that all CX and marketing leaders face by identifying value opportunities for growth. Take away best practices with:

- Real use cases of lessons learned implementing AI tools
- Concrete steps to develop a roadmap for successful implementation.
- Experimentation and quick scaling.

Strategize your business objectives with GenAI implementation to drive customer satisfaction.

Mariano Gutierrez, Head of Marketing Transformation Program, **Metlife**
Sean Albertson, CEO, **CX4ROCKS**

TRACK 1: STRATEGIC CX

2:15 PM PANEL: INVESTMENT MANAGEMENT AS FUDICIARY TO CLIENTS

Post-Pandemic Lessons: How the Investment Industry Has Transformed

It is important for an investment management company to facilitate financial independence for individuals. Ensure better customer experiences, foster stronger relationships, and build trust between your brand and your customers. Take back to your office strategies to:

- Understand your clients' investment objectives
- Establish the best risk-adjusted returns for your clients
- Support your work through research, data, and analytics

- The importance of not only meeting your customers needs but to also exceed them.
- Increasing your research scope beyond just your industry.
- Making connections to generate scenarios.
- Back casting against current strategies and planning forward.

Achieve market share growth through high value innovations, product innovation, and marketing strategies.

Kashmera Self, VP, Strategy Innovation, **Interac**
Andrew Clayton, Group Head of Customer Experience, **Close Brothers**

MODERATOR

TRACK 2: TECHNICAL CX

2:15 PM PANEL: NAVIGATING DIGITAL HORIZONS

How to Measure Success and Seamless Transaction Migration in Banking CX

As today's customers demand more from their banking experiences, banks are elevating their strategies. Improve your customer experience by leveraging advanced technologies and personalized services. Source your plan of action by:

- Improving your CX to achieve stacked wins of higher returns, faster growth, and lower costs
- Navigating through the accelerated shifts in customer banking relationships
- Co-creating with customers to increase the chances of success, especially for novel signature moments

Impact long-term financial well-being by maintaining deep-rooted value for your clients.

Brian Harman, VP, Business Development & Team Lead, **Global X**
Sean Albertson, CEO, **CX4ROCKS**

TRACK 1: STRATEGIC CX

2:45 PM FIRESIDE BRIDGE THE GAP BETWEEN MARKETING & EXPERIENCE

Align Marketing Initiatives with the Ever-Evolving Landscape of CX

Traversing the intersection of marketing and customer experience is crucial for innovative approaches, overcoming challenges, and impacting customer satisfaction. Adapt your marketing strategies to navigate the intricate balance between promotional efforts and creating seamless, customer-centric experiences. Develop a blueprint to:

- Seamlessly integrate marketing initiatives with customer experience strategies that yield success
- Align two critical components to create a cohesive and impactful approach that resonates with customers
- Take away practical solutions to common issues, enabling you to navigate challenges proactively within your own financial institution

Amplify the synergy between marketing and customer experience to enhance customer loyalty.

Brittany Wilson, Director, Marketing Planning & Brand Management, **Tangerine**
Sean Albertson, CEO, **CX4ROCKS** **MODERATOR**

Adapt your digital service transitions to enhance customer satisfaction and efficiency.

Sabrina Ng, AVP, Business Intelligence Practice, **TD**
Mona Afzal, Head of Enterprise Growth Marketing, **Scotiabank**
Mark Harrison, CEO, **TribeCX** **MODERATOR**

TRACK 2: TECHNICAL CX

2:45 PM FIRESIDE: PHYGITAL CX

The Omni Channel Experience for Better Customer Experience and Growth.

- Why is it important to drive consistency with both in-person and digital channels
- How can the front-line workforce and digital channels work in sync?
- Why is it beneficial to have human elements in digital platforms and digital elements in branches to help both channels blend
- Should branches be tailored to assist with higher risk transactions and digital channels to lower risk transactions

Sandip Chaudhury, Senior Director-Business development and partnerships, **RBC ON24**
Sue MacDonald, Chief Product & Marketing Officer, **People Corporation** **MODERATOR**



AGENDA - DAY 1

Tuesday, October 1, 2024

3:15 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT CX EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of customer experience innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

3:45 PM EVENING FIRESIDE: A DIGITAL OVERHAUL

How to Entirely Transform Your Customer Experiences

For traditional financial institutions, the question of whether it is easier to 'build a new bank' or improve existing processes is crucial. Overcoming challenges posed by legacy systems is equally vital. Take away specific solutions to:

- Enhance customer experiences through traditional bank/fintech partnerships
- Develop a customer-centric approach while maintaining operational and strategic agility
- Explore the potential of a 'digital-only' future

Transform your 'digital culture' through company-wide transformation programs.

Collin Jean, Director Digital Engagement, Sales, Growth, eCommerce - Digital Banking Director, **Servus Credit Union**
Sean Albertson, CEO, **CX4ROCKS** MODERATOR

4:15 PM CLOSING KEYNOTE AND COMMENTS: SINGLE VIEW INTEGRATION TO SUPPORT CUSTOMER EXPERIENCE

Achieving a predictable and seamless experiences across digital and human channels is important. This involves identifying and addressing roadblocks in your customer journey to ensure a consistent experience and easy access to information. Develop a blueprint to:

- Invest resources in onboarding as a forward driving investment
- Use AI tools to scale personalized experiences for a large customer base
- Empower customer service reps with a comprehensive view of the customer journey on one screen for proactive and customized support

Perfect a unified view of customer progress by integrating information across platforms and apps.

Sean Albertson, CEO, **CX4ROCKS**

4:45 PM EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC & NETWORKING

- **Relax and unwind** with tasty cocktails after a long day of learning.
- Don't miss your chance to win fun prizes at our **Reception Gift Giveaway**.
- Make dinner plans with your **new connections** and explore the best of what Toronto nightlife has to offer. Just be sure to set your alarm for Day 2!

6:00 PM CONFERENCE DAY 1 ADJOURNS



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AGENDA - DAY 2

Wednesday, October 2, 2024

7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **CX financial leaders**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices** and prepare for the day ahead.

8:45 AM OPENING COMMENTS FROM YOUR HOST

Gain insight into today's sessions so you can get the most out of your conference experience.

Sean Albertson, CEO, **CX4ROCKS**

9:00 AM FIRESIDE KEYNOTE:

Transforming the Global Client Experience Target Model.

It is important to dive into the transformation of Customer Experience (CX) from a traditional cost center to a vital profit generator. Create practical strategy on how CX is evolving from a mere corporate function into a robust line of business that drives revenue, enhances customer loyalty, and creates competitive advantage. Take back actionable plan to:

- Leveraging insights and real-world examples,
- Uncover the strategies that are reshaping CX into a cornerstone of business success.
- How to successfully integrate CX as a core line of business, whether you're looking to elevate your CX strategy or understand its financial impact, this discussion will offer valuable perspectives about

Vincenzo Ciampi, SVP, Global Client Experience, **IA Financial Group**

Anita Ghosh, CEO, **Bridjr** MODERATOR

9:30 AM INDUSTRY EXPERT:

Revolutionizing Customer Support in Financial Services through Visual and Digital Engagement

Supercharge your customer conversations beyond words. Allow your contact center agents to visually engage your customers with documents, contracts, terms & conditions, and statements, at the same time. Take away actionable strategies to:

- Identify key use cases in financial services where visual-enabled customer interactions can lead to higher ROI, lower AHT, and increased FCR.
- Integrate cutting-edge CX innovations for regulated industries and address the most common pain points amongst contact centers in FS.
- Turbocharge the contact center agent toolset and reduce churn and attrition, increase revenue per customer, and boost your NPS.

Dianne McCoubrey, VP of Sales, **GRYPP**

10:00 AM EXCLUSIVE CX SESSION: BRAND POWER

Deliver a Premium Value to Your Customers Through an Effective Communication Strategy

Eighty-one percent of companies consider customer experience a competitive differentiator. Understanding a customer's interests can be challenging, but their perception of your business significantly impacts brand loyalty. Achieve a step-by-step action plan to:

- Formulate a content strategy that resonates with users and aligns with your brand
- Communicate with users using a consistent brand voice
- Infuse your brand personality into CX design positively

Improve your customer communication strategy to thrive in today's competitive marketplace.

Stephanie Wolfe, EVP and Head, Marketing, **Global X**

Andrew Clayton, Group Head of Customer Experience, **Close Brothers** MODERATOR

10:30 AM ROUNDTABLES → DISCOVER THOUGHT-PROVOKING IDEAS

Take a deep dive down the innovation rabbit hole in one of our roundtable discussions. Share common challenges and best practices with your CX financial services peers on a topic of your choosing:

1. **Customer Emotion:** Design customer journeys with emotions in mind.
2. **Fraud Prevention:** Protect your customer's sensitive data while balancing CX.
3. **Digital and Frictionless CX:** Enhance seamless experiences for your customers.
4. **Customer Intelligence:** Leverage data analytics and customer insights for strategic decisions and personalized experiences.
5. **Customer Journey:** Create retention-driving experiences.
6. **Technology Applications:** Identify areas of opportunity and improvement in CX.
7. **Customer Feedback:** Unlock the next generation of CX with powerful insights.

11:00 AM EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest **customer experience technology** and strategies with our leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

11:30 AM TD CASE STUDY: SONIC BRANDING IN THE FINANCIAL SERVICES WORLD

How to build engagement and preference across communications and brand experiences through sound

Matt Houghton, Digital and Integrated Marketing Leader, **Interac Corp.**

Valentin Fleur, Head of Strategy, Managing Director Canada, **Sixieme Son** MODERATOR



AGENDA - DAY 2

Wednesday, October 2, 2024

12:00 PM PANEL: HUMAN-DRIVEN VS DIGITAL EXPERIENCES

How B2B vs B2C Align and Diverge in Experience Expectations

As customer expectations continue to evolve, organizations must strike the right balance between personalized advisory services and seamless digital experiences. Optimize the B2B and B2C customer journeys by leveraging both high-touch, advice-driven interactions and intuitive self-service capabilities. Master success factors for:

- Identifying the key similarities and differences between B2B and B2C customer experience needs
- Building credibility and trust as a “trusted advisor” through personalized, consultative engagements
- Incorporating “advice with integrity” to prioritize customer needs over product pitches
- Integrating digital self-service with human-powered advisory services for a cohesive omnichannel experience
- Proactively addressing unmet customer needs through data-driven insights and tailored solutions

Align your B2B CX to meet the evolving expectations of today's digitally-savvy, relationship-oriented buyers.

Sue MacDonald, Chief Product & Marketing Officer, **People Corporation**

Karim Bishara, Director, Customer Success, **Ethoca by Mastercard**

Sean Albertson, CEO, **CX4ROCKS** MODERATOR

12:30 PM NETWORKING LUNCH: DELVE INTO CX CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest issues in CX for financial services**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **customer experience colleagues**.

1:30 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
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2:00 PM INDUSTRY EXPERT:

Improve Customer Experience by Blending First and Third-Party Data

As the marketing world becomes more complex due to media fragmentation, cookie deprecation, and more restrictive privacy laws, marketers' jobs have become significantly more challenging. Master success factors on:

- Leveraging the power of blending first—and third-party data to improve organizational insights and customer experience.
- How the insights can be actioned
- How the emerging areas like data collaboration and clean rooms can enhance customer experience and improve measurement.

Larry Filler, Senior Vice President & Practice Leader, **Environics Analytics**

2:30 PM FIRESIDE: REGULATORY PERSPECTIVE

Embracing Regulatory Change to Deliver Differentiated Experiences

In 2023 the UK Financial Conduct Authority strengthened expectations of firms and their role in Consumer Duty: acting in good faith, avoiding foreseeable harm and enabling and supporting customers to pursue their financial objectives whilst ensuring good customer outcomes are always delivered. Embrace the intent of the framework and use this as a catalyst to redesign experiences. Create an action plan to:

- Establish a common ambition and align the entire organisation around a shared Customer Commitment.
- Engage all employees in delivering the experience customers valued
- Purposefully design the end-to-end experience to meet the needs of different types of customers

Embed customer centricity within your culture and as part of daily behaviours.

Andrew Clayton, Chief Customer Officer, **Close Brothers**

Mark Harrison, CEO, **TribeCX** MODERATOR

3:00 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of customer experience innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

3:30 PM SECRET SAUCE FIRESIDE: TX IN FINANCIAL SERVICES

Why it is Imperative to Deliver the Total Experience in Financial Services

Financial services customers expect trusted, relevant, and personal experiences. To stay competitive, FIs must deliver TX, providing consistent, seamless interactions for customers and employees across all touchpoints. Source practical tips to:

- Optimize the customer experience (CX)
- Achieve operational excellence while ensuring regulatory compliance and security
- Deliver the total experience (TX)



AGENDA - DAY 2

Wednesday, October 2, 2024

Reduce fragmented interactions, errors, and service delays through TX for enhanced service delivery.

Nazia Shahrin, VP, Architecture, Data Governance & Data Protection, **Fidelity Investments**

Andrew Clayton, Group Head of Customer Experience, **Close Brothers** MODERATOR

4:00 PM CLOSING FIRESIDE: CUSTOMER JOURNEY AND IT'S NUANCES

Blending Customer Journey with Customer Specifics

Crafting a successful customer journey requires a deep understanding of customer needs and the ability to identify automation opportunities. Refine your technology innovation and customer experience strategies to ensure alignment with customer requirements and seamless automation. Take away specific solutions to:

- Assess critical touch points in the customer journey
- Consider age and technological efficiency
- Embrace diversity, equity, and inclusion in technology implementation

Amplify your differentiation between projected efficiency and realized outcomes for improved customer experience solutions.

Natalie Redman Nah, Senior Director, Credit Card Engagement Marketing and CRM, **CIBC**

Sean Albertson, CEO, **CX4ROCKS** MODERATOR

4:30 PM FIRESIDE CHAT: EMPOWERING CUSTOMER CENTRICITY

Harnessing CX Tools to Transform Organizational Culture

It is significant to have strong foundational framework understanding and serving your customers effectively. A robust framework encompasses journey maps, business archetypes, personas, and a comprehensive list of customer priorities. Transform your methods for communicating through a framework with an immersive digital experience, enriched with impactful visuals, videos, and infographics. Create a comprehensive customer framework by:

- Anchoring research and customer listening to core principles.
- Communicating the framework through high-impact digital experiences.
- Leveraging CX tools to drive a customer-focused organizational culture.

Unify your organization's customer strategy, empowering transformational teams with a clear and consistent focus.

Robert Labbe, CX Director, **Export Development Canada**

Mark Harrison, CEO, **TribeCX** MODERATOR

5:00 PM CONFERENCE UNPANEL: AI INVASION OR ENHANCED HUMANITY?

AI is everywhere. Is it coming for our jobs or is it coming to make us better...or both? We'll discuss several of the prevailing trends of artificial intelligence and explore how companies today are leveraging this new technology to evolve. From this session you will:

- Gain insights into growing use cases of AI for financial services
- Understand the hype cycle of AI and our place in it
- Challenge your thinking and strategies for AI adoption

Sean Albertson, CEO, **CX4ROCKS** MODERATOR

5:30PM CONFERENCE CONCLUDES



“

CXFS brings together the brightest minds in the industry with great content and speakers. It's an invaluable experience with excellent opportunities to network and a well-chosen selection of companies and topics.

Royal Bank of Canada



“

The panel discussion on customer experience digital transformation at CXFS was incredibly insightful. The event featured outstanding content and speakers and offered exceptional networking opportunities. I was thoroughly impressed and can't wait to see this event grow even more.

Manulife Insurance



“

Insightful. Relevant. Confirmed value realized.

CI Investments



“

The Summit covered great topics and provided an enriching experience. I will definitely return and promote it to others.

Pathwise Credit Union



“

CXFS brings together the brightest minds in the industry with great content and speakers. It's an invaluable experience with excellent opportunities to network and a well-chosen selection of companies and topics.

Royal Bank of Canada



“

Great work in accounting for the various sectors within financial services and delivering truly excellent content and presentations. My notebook is full!

Sun Life Financial





Customer
Experience for
Financial
Services

October 1 & 2, 2024
Toronto Marriott City Center
Toronto, ON

How to Register

IN-PERSON PASS

FULL TWO-DAY ACCESS:

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables and one week of pre-event networking via our dedicated platform

FACE-TO-FACE NETWORKING:

Connect and build valuable relationships with our audience of thought leaders

5-STAR TREATMENT:

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location

EXPO HALL:

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

SPEAKER PRESENTATIONS:

Take home PowerPoints and white papers addressing your biggest challenges

ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event

VIRTUAL PASS

TWO-DAY LIVE STREAM ACCESS:

Tune into keynote sessions, panel discussions and case studies with real-time Q&A from the comfort of your home

VIRTUAL NETWORKING:

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool

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**REGISTER
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VENDORS/SUPPLIERS/ CONSULTANTS

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Customer Experience for Financial Services Summit



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