

INDUSTRY
NOW

ARTIFICIAL INTELLIGENCE IN FINANCIAL SERVICES

AGENDA

Virtual Masterclass
June 16, 2021

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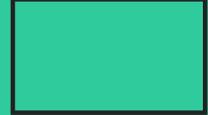
Agenda

11:00-11:10 AM EST

OPENING REMARKS

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11:10-11:40 AM EST

STATE OF THE UNION

From 'nice to have' to 'essential: Leveraging how organizations view digital for long-lasting innovation

- The pandemic has proven, once and for all, that the future is digital. How do you build on that proof of concept?
- Moving from the perception of digital being a nice to have to an essential, and the implications of forced adoption of digital channels.
- Leveraging that change in mood and opinion for long-lasting innovation and digitisation across your business

Tirthankar Choudhuri

VP, Digital Data Sciences
American Express



11:40AM-12:10 PM EST

PARTNER CASE STUDY

Getting your approach to innovation right – Open innovation and strategic partnerships

- Examining the extent to which the pandemic has reinforced the importance of open innovation for digital transformation
- Reimagining innovation, and how the needle has moved in the past year
- How have strategic partnerships increased in importance, and how can they best be harnessed in turbulent times to increase efficiencies, better meet customer needs, and provide long-term value?
- Monetizing and maximizing the power of innovation
- Becoming more open and collaborative as an organisation with your culture of innovation
- How has this willingness to adapt and do things differently played out in practice, and how can seeking out agile new partnerships in uncertain times help sustain lasting change and success?

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12:10-12:40 PM EST

FOCUS GROUP EXERCISE 1

FOCUS GROUP TOPICS:

- **Modernization of operating models**
Agus Sudjianto – EVP, Head of Corporate Model Risk – Wells Fargo
- **Automation and back-end digital transformation**
Siddharth Mehrotra – VP, Technology – Citi
- **Infrastructure, risk, and security in the new normal**
Steven Dickerson – SVP and Chief Data Scientist – Discover
Raghu Kulkarni – VP, Data Science – Discover
- **Managing the machines: ensuring transparency and explainability with AI**
Jacob Kosoff – Head of Model Risk – Regions Bank



12:40-1:10 PM EST

PANEL 1

Using an Omnichannel Approach to Effectively Reach Guests and Improve the Customer Experience

- Where does AI stand to have the most transformational impact?
- A collaborative approach: how can departments work together to create a clear AI strategy?
- Blowing off the legacy cobwebs: what steps need to be taken to integrate AI with legacy systems effectively?
- Overcoming the data challenge: how can firms ensure AI has enough data to learn effectively?
- Engage, enrich and retain: what new opportunities will AI create for the workforce?
- A new era of AI-driven convenience: how can financial services best capitalize on this?
Monetising the gold mine: how can AI be commercialized most effectively?
- Visualizing the future: what will the AI landscape look like in 2025?

Agus Sudjianto

EVP, Head of Corporate Model Risk
Wells Fargo



Dhagash Mehta

Senior Manager, Investment
Strategist – ML and Asset Allocation
Vanguard



Jacob Kosoff

Head of Model Risk
Regions Bank



Siddharth Mehrotra

VP, Technology
Citi



1:10-1:40 PM EST

AFTERNOON MASTERCLASS

Necessity is the mother of invention': Where will COVID-propelled change be sustained, and how far will we revert back to past habits?

- The sheer pace and scale of digital transformation due to COVID has been immense, but how and where will we apply and sustain these changes?
- Exploring the lasting impact of the COVID crisis: what is transient, and what is more substantive and long-lasting in terms of adoption of digital technologies?
- What has changed across retail and corporate banking, and how have organizations re-oriented over these months?
- Where have we seen trends accelerated and, crucially, what do we expect to stay changed and continue changing

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1:40-2:10 PM EST

PARTNER CASE STUDY

Moving at the speed of data: towards real-time analytics

- Understanding the critical elements of effective real-time analytics
- How can real-time analytics enable new products & services?
- Real-time risk management: what are the most powerful use cases?
- What kind of opportunities are new connected devices creating?
- How can behavioral and real-time data best be combined into actionable insights?
- What role can unstructured data play in developing real-time analytics?
- How far are we from realizing the dream of real-time data management?

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12:10-12:40 PM EST

FOCUS GROUP EXERCISE 2

FOCUS GROUP TOPICS:

- **Modernization of operating models**

Balaji Gopalakrishnan – SVP, Head of Machine Learning and Data Science – Wells Fargo

- **Automation and back-end digital transformation**

Ben Maxim – AVP, Digital Strategy and Innovation – Michigan State University FCU

- **Infrastructure, risk, and security in the new normal**

Prashant Dhingra – Managing Director, Machine Learning – JP Morgan Chase

- **Managing the machines: ensuring transparency and explainability with AI**

Xinyu Wu – SVP, AI/ML Model Validation – U.S. Bank



12:40-1:10 PM EST

PANEL 2

Fuelling Future Growth with the Right Talent, Retention, and Inspiration in a Post-Pandemic World

- Exploring the shifts in customer behavior during the pandemic that reinforced the need to engage customers more effectively.
- What lasting changes will this lead to with respect to radically shifting customer demands, and how can we meet their new and altering expectations?
- How do you understand the new and evolving needs of your customers, in order to better serve them?
- Offering examples where training, mentorship, job shadowing, and cycling through different job functions improves retention, job satisfaction, and contributes to improved performance
- Capitalising on advances in digital onboarding and digital servicing to sustain lasting improvements in customer-centric services.

Balaji Gopalakrishnan
SVP, Head of Machine Learning and Data Science
Wells Fargo



Ben Maxim
AVP, Digital Strategy and Innovation
Michigan State University FCU



Prashant Dhingra
Managing Director, Machine Learning
JP Morgan Chase



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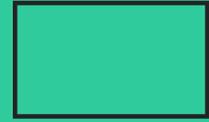


2:40-3:10 PM EST

Closing Remarks

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2:40-3:10 PM EST

Open Networking