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International Business Review Presents:

# AI for CX 2024

## ARTIFICIAL INTELLIGENCE

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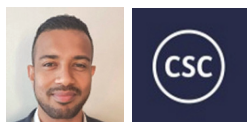
### IN FINANCIAL SERVICES 2024 SUMMIT

18th - 19th November 2024, Sydney Central Hotel

"Leveraging AI for CX Optimization"

SPECIAL OFFER  
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Early Invited Speakers Include:



**Daminda Kumara**  
 Chief Information Security Officer (CISO), Commonwealth Superannuation Corporation



**Shoumo Thakurta**  
 Responsible AI and Generative AI CoE lead, Commonwealth Bank



**Ronan Leonard**  
 Director of Digital Solutions Partnerships, LSEG (London Stock Exchange Group)



**Rodrigo Musicante**  
 Program Manager - Business Excellence and Transformation, NAB



**Simon Burt**  
 Head of Digital CX and Innovation, Newcastle Permanent Building Society



**Willem Paling**  
 Head of Analytics & AI, IAG



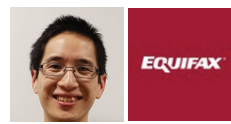
**Mihail Dugarov**  
 Manager - Clearing Risk Product Coverage, ASX



**Trung Vo**  
 Director, Data Science, Australian Taxation Office



**Niraj Naidu**  
 Head of Strategy & Enterprise Architecture, Smartpay Australia



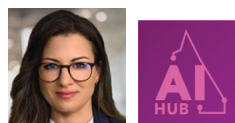
**Andrew Chan**  
 GM - Data & Analytics Capability Development, Equifax



**Chris Rollings**  
 Founder, Dare Together, Consultant, ex-Google



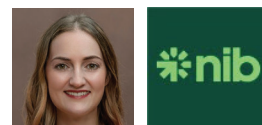
**Stephen Huppert**  
 Independent Consultant & Advisor



**Stephanie Chaousis**  
 Director, Queensland AI Hub



**Susan Gibson**  
 Head of Data Analytics and AI, UTS



**Emma Blanas**  
 Senior Manager - AI, ML and Data Science, nib Group



**Stela Solar**  
 Director, National AI Centre, CSIRO

## MASTERCLASS

EMPOWER YOUR BUSINESS WITH AI:  
 THE PATH FROM DATA TO DOMINANCE



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# AI for CX 2024 ARTIFICIAL INTELLIGENCE

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DAY 1



**9:00 Chair's Opening Remarks**



**Stephen Huppert**, *Independent Consultant & Advisor*

**STRATEGY & ROADMAP**

**9:10 OPENING ADDRESS: HAS YOUR ORGANIZATION ADOPTED A CULTURE OF INNOVATION TO BECOME AI NATIVE?**

- How do organisations begin to adopt a growth mindset to bring innovation into the business?
- How can organisations use design thinking principles to leverage Ai as a vehicle for innovation?
- How can organisations look at actionable ways of adopting Ai into practices to futureproof themselves?

**Chris Rollings**, *Founder, Dare Together, Consultant, ex-Google*  
This session will be 20 minutes presentation followed by 30 minutes open floor Q&A.



**10:00 KEYNOTE: REIMAGINING BANKING THROUGH GENERATIVE AI**

- Enhancing digital banking customer interactions by constructing an agile Ai environment
- Strategically assess how to strengthen and deepen the customer experience as increasing numbers of customers switch to digital banking
- Streamlining responsiveness with conversational Ai
- Focussing on developing Ai-driven products and services to enhance customer retention

**Shoumo Thakurta**, *Responsible AI and Generative AI CoE lead, Commonwealth Bank*



**CASE STUDY**

**10:30 WHERE WE ARE AT AND WHERE WE ARE HEADED!**

- The journey we're on and how are we thinking about Ai
- How are we beginning to embrace Ai at Newcastle Permanent Building Society in a digital age?
- What does our Ai Roadmap look like at Newcastle Permanent Building Society?

**Simon Burt**, *Head of Digital CX and Innovation, Newcastle Permanent Building Society*



**11:10 Networking Break**

**Data 1.0**

**11:40 THE GENAI OPPORTUNITY!**

- The why? How Gen AI, with its advanced capabilities in machine learning, natural language processing, and other AI technologies, offers tremendous opportunities for innovation and problem-solving
- Empowering Human-AI Collaboration - Exploring how Gen AI can empower human-AI collaboration to enhance productivity, creativity, and decision-making Building trusted relationships
- Governance, ethical and responsible AI deployment - Emphasizing the importance of ethical considerations and responsible deployment of Gen AI technologies

**Susan Gibson**, *Head of Data Analytics and AI, UTS*



**12:20 REVIEWING DATA INTEGRATION AND FUSION INTO CORE BUSINESS OPERATIONS**

- Combining data from multiple sources to bridge the gap on core business operations
- Assessing techniques for integrating heterogeneous data
- Reviewing challenges and strategizing to craft robust data fusion solution to support Ai

**Session held for:**  
**Andrew Chan**, *GM - Data & Analytics Capability Development, Equifax*



**13:00 Networking Lunch**

**INTEGRATION**

**14:00 EDUCATION 101: AI IS YOUR SUPPORT SYSTEM TO FOSTER DEEPER CUSTOMER RELATIONSHIPS**

- How does AI integration work and what sort of internal processes or workflows are you improving?
- How are you classifying and communicating these projects internally and what's the core objective when leveraging Ai?
- Are you attempting to be fully automated?
- How can this propel operational efficiency by harnessing the power of advanced AI support systems?

**Mihail Dungarov**, *Manager - Clearing Risk Product Coverage, ASX*



**14:40 OPEN FLOOR DISCUSSION: BUILDING A TECH STACK AND INTEGRATING IT TO ENSURE THAT IT EFFECTIVELY SUPPORTS THE ORGANIZATION'S NEEDS AND OBJECTIVES**

PANEL DISCUSSION



This session will be a 10-minute presentation followed by 30 minutes open floor discussion led by the chair.

- Assessment of organizational needs. What does this look like for you?
- What factors need to be considered when looking at technology selection for integration?
- How to create a comprehensive plan for the tech stack architecture, considering how different components will interact and integrate with each other?
- Discussing challenges associated with customizing vs plug and play solutions
- Adapt and evolve the tech stack over time to keep pace with changes in technology and business requirements.
- LLM beta-phase – copilot version and insight on success

**15:40 Afternoon Tea**

**OPTIMIZATION**

**16:10 MAXIMIZING AI'S POTENTIAL WITHOUT COMPROMISING SECURITY AND TRUST**

The art of harnessing AI's capabilities in BFSI while upholding the pillars of security and trust. In this session we will gain insights into embedding AI seamlessly into BFSI processes, ensuring robust defences against threats, and fostering customer trust in an AI-driven era.

- Integrate AI solutions into BFSI workflows without compromising data integrity or security.
- Develop transparent AI systems that customers and stakeholders can trust and rely upon.
- Delve into proactive measures and advanced AI technologies to fortify BFSI sectors against emerging cyber threats.

**Daminda Kumara**, *CISO, Commonwealth Superannuation Corporation*



**ETHICS AND RESPONSIBLE AI**

**16:50 DEMOCRATIZING FINANCE THROUGH ETHICAL AI TO FOSTER INCLUSIVE GROWTH**

Financial institutions have a pivotal role in steering AI towards creating a more equitable financial landscape, ensuring that technology serves as a bridge rather than a barrier. This intersection of AI and financial inclusivity, emphasizing the need for a principled approach. This session will help you gain a comprehensive understanding of how ethical AI can pave the way for democratized finance.

- Ethical AI frameworks for balancing between innovation and responsibility
- Assessing responsibility and accountability
- Evaluating bias with GenAI and standards (voluntary and mandatory)
- Foster customer and supply chain trust as part of responsible AI with short feedback loops to ensure customer outcomes are intention

**18:10 Networking Drinks**

**19:00 Close of Conference Day One**

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DAY 2

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## 9:00 Chair's Opening Remarks



**Stephen Huppert**, *Independent Consultant & Advisor*

## DATA 2.0

### 9:10 LEVERAGING PREDICTIVE ANALYTICAL INSIGHTS TO ANTICIPATE CUSTOMER NEEDS AND PREFERENCES

- Assessing strategies for creating diverse and representative datasets.
- How data supports decision-making processes and creates CX opportunities for innovation in data-driven AI
- Examples of successful data-driven initiatives and the importance of high-quality training data
- Explore how predictive analytics powered by AI generate valuable insights into customer behaviour



**Willem Paling**, *Head of Analytics & AI, IAG*

## MASTERCLASS

### 9:50 - 11:20 EMPOWER YOUR BUSINESS WITH AI: THE PATH FROM DATA TO DOMINANCE

Redefining your approach to digital ecosystems, coupled with a well-defined AI strategy, can propel your organization from experimental stages to implementation. This session will be in masterclass format and remain interactive throughout. Areas for consideration include:

- Where to begin on the AI deployment journey
- The challenges associated with deploying AI capabilities and discovering how adopting AI as the cornerstone can reshape your value propositions and revolutionize customer experiences.
- Dissecting the intricacies of AI and scaling up and spearheading the digital transformation journey.
- From experimentation to execution, navigating the practical landscape of AI



**Stephanie Chaouis**, *Director, Queensland AI Hub*

## 11:20 Networking Break

## AI STRATEGY

### 11:50 LEVERAGING DATA EFFECTIVELY TO HARNESS ITS POWER

- Defining what data is and its role in AI implementation
- Discussing the relationship between data and AI
- Discussing the types of data: Structured, unstructured, and semi-structured data
- Assessing data acquisition, quality, storage, and management



**Stela Solar**, *Director, National AI Centre, CSIRO*

## 12:30 Networking Lunch

### 13:30 CASE STUDY INSIGHT AND OPEN FLOOR DISCUSSION:

- Discussing the AI reworking of integration pain points from a process lens
- Gaining a seat at the table and viewing the learnings of process change and tech implementation
- What steps are we taking to close the gap internally to understand business objectives, not just CX as part of the end goal



**Rodrigo Musicante**, *Program Manager - Business Excellence and Transformation, NAB*

### 14:10 WHAT IS ETHICAL AI AND WHY IS IT IMPORTANT!



- Ethical AI uncovered
- AI data governance model
- AI risk management approaches

**Trung Vo**, *Director, Data Science, Australian Taxation Office*

### 14:50 Afternoon Tea

### 15:20 CRAFTING A RESILIENT AI STRATEGY TO HARNESS OPERATIONAL EFFICIENCIES, REGULATORY COMPLIANCE, AND CUSTOMER SATISFACTION

- Steering AI to foster customer trust and operational precision
- Ensure enhanced transparency and explainability when considering ethical AI design and deployment to ensure fairness, accountability and non-discrimination
- Creating personalized AI-driven interactions and recommendations to provide tailored experiences that resonate with individual customers
- Solicit feedback from customers regularly to understand their expectations and concerns regarding AI-powered services and adjust strategies accordingly

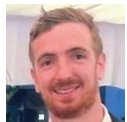


**Niraj Naidu**, *Head of Strategy & Enterprise Architecture, Smartpay Australia*

### CRAFTING HUMAN-CENTRIC DECISION FRAMEWORKS FOR RESPONSIBLE INNOVATION

Embrace the pivotal role of Artificial Intelligence (AI) in elevating data analysis, streamlining processes, and fostering informed decision-making within the BFSI sector. Safeguard your AI investments by futureproofing them, guaranteeing enduring relevance and a competitive edge. Discover actionable insights to construct a resilient AI infrastructure that not only anticipates but also effectively responds to the dynamic challenges on the horizon.

- Navigating the Complexities of AI Governance in Financial Services
- Advocating for Essential Human Intervention in AI-Driven Decision-Making
- Securing AI Projects with Competent Oversight and Assurance Processes



**Ronan Leonard**, *Director of Digital Solutions Partnerships, LSEG*

## CHANGE AND CONTINUOUS IMPROVEMENT

### 16:00 MAXIMIZING ORGANIZATIONAL RESILIENCE THROUGH ORCHESTRATING AGILE CHANGE FOR SUSTAINABLE GROWTH

OPEN FLOOR DISCUSSION



- Uncovering the transformative power of orchestrating change with agility
- Adaptive leadership in BFSI, assessing how to navigate change dynamics
- How to harmonize change management and continuous improvements
- Measuring momentum: KPIs for agile change

### 17:00 Chair's Closing Remarks

### 17:10 Close of Conference Day Two

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## REGISTRATION



### IN-PERSON ATTENDANCE REGISTRATION COST

#### SINGLE REGISTRATION PRICING - 2 days conference

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- Early Bird Registration: \$2695 + GST (Register before 30th September & Save)
- Normal rate: \$2895 + GST (Register after 30th September & Save)

GROUP TEAM REGISTRATION - Register & pay for 3 delegates & get unlimited registrations\* (\*Can attend in-person or virtually)

- Register with Group registration offer

### VIRTUAL ATTENDANCE REGISTRATION COST:

#### SINGLE REGISTRATION PRICING - 2 Days Conference

- Super Early Bird Registration: \$1795 + GST (Register before 30th August & Save)
- Early Bird Registration: \$1895 + GST (Register before 30th September & Save)
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4th Delegate Name (Dr/Mr/Mrs/Ms) \_\_\_\_\_  
 Job Title: \_\_\_\_\_  
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