

# CX **EAST** BFSI USA EXCHANGE

14th -15th October 2025 | Miami Marriott Biscayne Bay, Florida

## SPONSORSHIP & EXHIBITION OPPORTUNITIES

**YOUR PREMIER  
INVITATION-ONLY  
MEETING FOR CX &  
CUSTOMER CONTACT  
LEADERSHIP IN BFSI**



**220**

Pre-scheduled  
One-to-One Meetings



**80**

Leaders in  
Attendance



**20**

Expert  
Speakers



**10+**

Hours of  
Networking

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Now in its 12th year, the CX BFSI USA Exchange unites senior CX leaders from North America's top banking, financial services, and insurance organizations. This exclusive, invite-only event offers direct access to decision-makers driving CX transformation—within a private, focused setting. Partnering with the Exchange positions your brand at the forefront of innovation, generating high-value connections and measurable ROI.

**80 Leaders in attendance. 10+ hours of dedicated networking. Don't miss out on this unparalleled opportunity to be a part of this exciting and fruitful journey!**

### World Class Speakers for #CXBFSIUSA



**Brian Nourie**

Executive Vice President, Chief Growth Officer  
M&T Bank

**Nidhi Daga**

SVP, Marketing & Digital Experiences  
JPMorgan Chase

**Vinjay Fha**

COO  
BMO Group

**Alex Misiaszek**

SVP, Experience Design Director Emerging Experiences  
Truist

**Michael Nevski**

Director of Global Insights  
Visa

**Andy Netzel**

SVP, CX Strategy Director  
Key Bank

**Douglas Figueredo**

SMD Head of Digital Experience  
Webster Bank

**Mary Hardy**

SVP, Customer Lifecycle Marketing  
Huntington

**"We get insights on different challenges and needs they have whether they're immediate or high need which allows for effective conversations."**

Treasure Data

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# TRADITIONAL EVENT VS EXCHANGE MODEL

For more information email us at  
[partner@iqpc.co.uk](mailto:partner@iqpc.co.uk)

To ensure the Exchanges offer the highest degree of relevancy, only senior executives who are direct budget holders/influencers for strategising and implementing customer experience solutions and solutions from large enterprises from North America's leading brands are invited to attend. The CX BFSI Exchange USA is not a typical event, and there are some key distinguishing features that provide you with a truly unique forum in which to participate:

## Exchange Model

- ✓ Exchanges provide all solution providers with a clear, structured approach which allows them to cut through the crowd and meet with key, profiled end users through pre-scheduled meetings.
- ✓ 1:1 meetings only take place with executives you want to meet with & who want to meet with you!
- ✓ Attendees are at a high strategic level where everyone speaks freely about the realities of their role and challenges.
- ✓ You arrange follow up meetings with prospects close to product adoption.



**“There are always follow up conversations and people have made introductions to us who they think might be the right fit. We have built relationships with not only the delegates that have attended but also their wider networks.”**

ServiceNow

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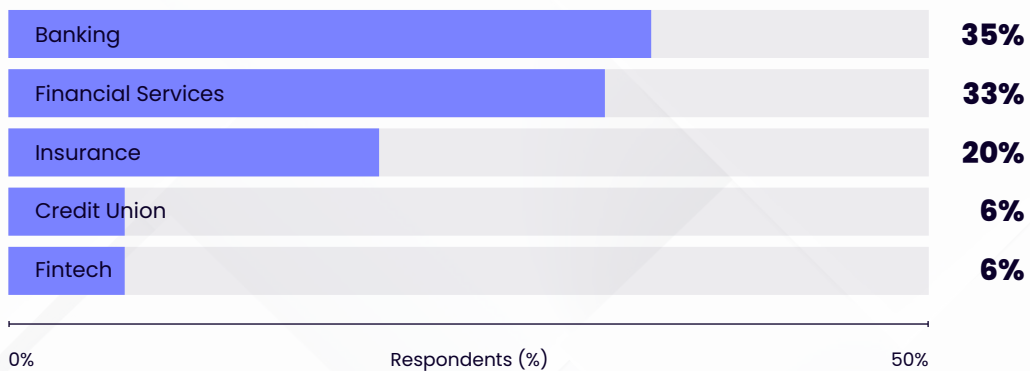
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# ATTENDEE BREAKDOWN

## Industry breakdown



## Attendees role/function - breakdown

- ✓ Experience
- ✓ Customer Contact
- ✓ Digital & UX
- ✓ Operations
- ✓ Marketing
- ✓ Transformation

## Solutions of high interest for our audience include:

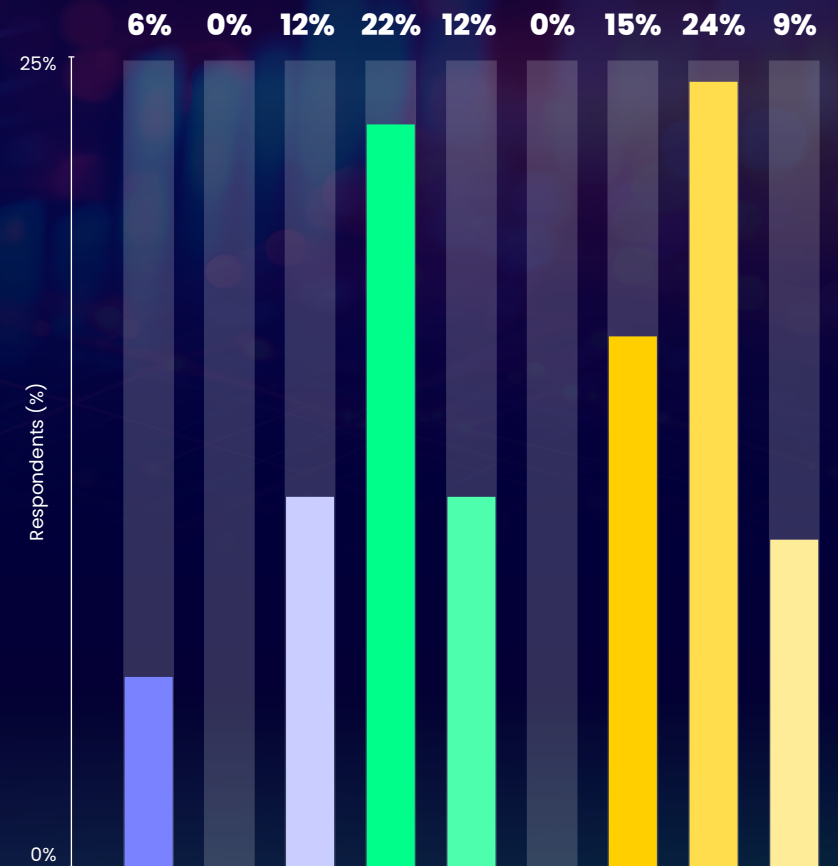
- ✓ Customer Journey Mapping
- ✓ User Experience Analytics & DXP
- ✓ Intuitive Personalization
- ✓ Self-Service Automation
- ✓ Consultancies, CX Strategy and Change
- ✓ Customer Communications Management

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## Seniority

- C-Suite
- VP
- Head
- EVP
- AVP
- Director
- SVP/FVP
- Managing Director
- Manager



# ATTENDEE QUALIFICATIONS

Each attendee undergoes a robust profiling process, highlighting specific challenges and areas they are looking to invest in along with a time frame for when they are looking to invest. Invested priorities are sorted into:

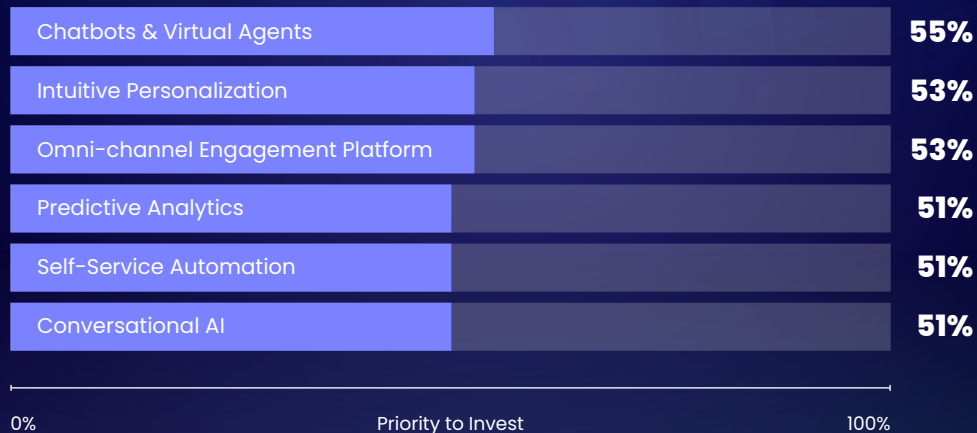
High

Medium

Low

Each partner is expertly matched to the attendee based on the solutions they are providing along with their realistic time frame to invest.

## Investment priorities



**Each attendee must also match certain criteria in order to be qualified to attend the Exchange, based on seniority, size of company and revenue.**



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# SAMPLE ATTENDEE PROFILE



**Delegate Profile Form**  
 June 2<sup>nd</sup> -3<sup>rd</sup>, 2025  
 The Camby, Pheonix, Arizona, USA

|               |              |            |                          |
|---------------|--------------|------------|--------------------------|
| Company Name: | XXXXXXXXXXXX | Job Title: | Chief Experience Officer |
| Name          | XXXXXXXXXXXX | E-mail:    | XXXXXXXXXXXX             |
| Switch:       |              | Website    | XXXXXXXXXXXX             |
| Direct:       | XXXXXXXXXXXX | Address:   | XXXXXXXXXXXX             |
| Mobile:       |              |            |                          |

*\*By submitting this information you agree for your details to be shared with event sponsors*  
 Please answer the following to qualify your eligibility to attend:  
 Y/N My company's annual turnover is £1 billion or above  
 Y/N I control or directly influence where customer experience budget is spent  
 Y/N I control or directly influence corporate strategy at regional, divisional or group level

| About You & Your Organization     |   |   |
|-----------------------------------|---|---|
| Company's main activity           | Credit Unions.  | Name of organization                            |
| Personal strategic responsibility | I lead the CX team. My primary focus in Customer Experience is to remove friction and make interactions faster, easier, and better for our customers. I work closely with marketing, which I also oversee, and collaborate with other departments, including our frontline teams, even though they now fall under different leadership. A key initiative I'm driving is the implementation of voice AI to enhance staff training and role-playing, ensuring our teams are better prepared for sales and service interactions. Additionally, we're refining our customer segmentation to identify and serve our ideal members more effectively—especially with the launch of our new business banking division, which is designed to support small businesses. | Who else is responsible for CX?                 |
| Regions responsible for           | Washington.   | Does your organization have a digital strategy? |
| B2C, B2B or Both                  | Both.   | Are you currently using a CX solution?          |
| Start date of current role        | May 2020.   | How many years have you worked in CX?           |

| Areas of Interest  |   |  |  |
|--------------------|---|--|--|
|                    | What 2-3 key areas are you looking to invest in, and what is driving this focus?  | Are you allocating budget to address this challenge? | Timescale: 6-12/12-24/Ongoing<br>End of contract, RFI Process, Project going live? |
| 1.                 | <b>AI – Using Voice AI in call centers</b><br><br>I'm investing in voice AI technology to enhance staff training and role-playing in our call centers. This will help our teams refine their sales and service skills in a realistic environment, ensuring they're well-prepared to deliver exceptional customer interactions. Even though this is a sales function we are actively approaching this from the CX side and ensuring it is a good customer experience.  | Yes.   | 6-12   |
| 2.                 | <b>Enhancing Customer Experience with Technology</b><br><br>We are making a strategic investment in technology to enhance the customer experience across the board. Our focus is on using advanced digital tools and data analytics to better understand our customers' needs and provide more personalized, proactive service. By improving our CX technology stack, we can optimize the way we interact with customers, streamline processes, and offer services that are both more efficient and customer centric. We believe this will allow us to improve overall satisfaction and retention, while also staying competitive in an increasingly digital world. | Yes.   | 6-12   |
| 3.                 | <b>Data-Driven Insights for CX Improvements</b><br>Another area of focus for us in 2025 is using data-driven insights to continuously improve the customer experience. We are committed to better understanding the patterns in customer behavior through data analytics, which will help us identify trends, pain points, and opportunities for improvement. This will allow us to anticipate customer needs and respond more effectively. By improving our understanding of the customer's journey, we can deliver a more personalized and proactive service that aligns with customer expectations.  | Yes.   | 6-12   |
| Solution Providers |   |  |  |
|                    | Are your contact centres outsourced? If yes, what are you outsourcing and who are your outsourcing partners?  | No   |  |
|                    | Are you looking to deploy a consultant for CX transformation over the next 6-12 months?   | No   |  |
|                    | Are you planning to redesign or re-platform any web properties within the next 12-18 months?  | No   |  |
|                    | Which customer experience solutions providers are you currently working with?   |  |  |
|                    | What is your total annual customer experience or customer service budget? (please specify currency)   |  |  |

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# PREVIOUS COMPANIES REPRESENTED INCLUDE:



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# KEY THEMES & FORMATS

Key topics from the Customer Experience banking, financial services and insurance world that will be explored during the two day Exchange:

- ✓ **Agility In Action: Adapting CX Amidst Unpredictable Market Shifts**
- ✓ **Driving Measurable Business Value Through Customer-Centric Culture & Journey Intelligence**
- ✓ **Strategic AI Integration: Real-World Approaches to CX Tech Deployment**
- ✓ **Predictive, Proactive & Personalized: Orchestrating Intelligent Customer Engagement**
- ✓ **Futureproofing CX: Security, Innovation, & What Comes Next**



## More networking time for strategic conversations:

Join the Exchange for international food and drinks at the end of Day 1 to unwind and network after a jam-packed day of learning. Networking breaks and one-on-one meetings are built into the agenda to foster sidebar discussions and new connections throughout the Exchange.



## 2-day agenda packs more content than ever before:

- **Plenary sessions:** Dive into the industry's hottest issues and discover actionable solutions.
- **Specialized streams:** Learn from the experts with presentations that enhance your knowledge and update you on key programs.
- **Think tank sessions and roundtables:** Collaborate with peers to tackle pressing challenges and explore cutting-edge solutions for your operations.

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# STRATEGIC PARTNERSHIP OPPORTUNITIES

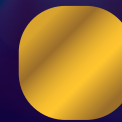
CX BFSI Exchange USA brings together a select group of senior, pre-qualified decision makers for two days of knowledge sharing, one-to-one meetings with solution providers and case studies. Designed to provide you with the opportunity to engage with key decision makers from North America's top enterprises. The one-to-one business meeting element of CX BFSI USA Exchange is what we are known for. Each Exchange meeting gives you 30 minutes of exclusive, uninterrupted time with key attendees of your choice. Each attendee is BANT qualified with their challenges and investment priorities established prior to the event.

- ✓ **Up to 20 one-to-one meetings with pre-qualified delegates**
- ✓ **Exclusive information on the challenges, needs and investment priorities of all attending delegates**
- ✓ **Your branding is featured at physical events, on the event website and on marketing and event materials promotion pre-and-post-event**
- ✓ **Prime 30 minute thought leadership opportunities**

## Partnership Options



**Lead**



**Gold**



**Silver**



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# STRATEGIC PARTNERSHIP OPPORTUNITIES



## One-to-One Business Meetings

The 30 minute pre-qualified one-on-one business meetings with leading senior executives are the most unique part of the Exchange. When registering, you will identify clients you wish to meet, so we can match your company with the executives who have a need for your solution.



## Think Tank

A sponsor led group discussion in a private room, designed around a hot topic or trend. This will contribute to solving challenges our pre-selected delegates face, and how the services offered by sponsors can help.



## Plenary Keynote Session

Take the main stage and position yourself as an expert and thought leader with a 30 minute presentation- this could be a case study or conducted as a panel discussion, with a client/ participants of your choosing.



## Roundtable

By speaking alongside key industry players you can enforce your organisation's branding and reputation as a leading solution provider in the market place, providing a unique networking opportunity and allowing you to offer objective, flexible, and relevant solutions for the future.



## Panel Discussion

Demonstrate your organisation's knowledge and experience in a 45 minute open and engaging discussion, alongside other key industry leaders.



## Breakfast Briefing

Begin your day with a 60-minute private breakfast meeting for up to 20 pre-registered attendees. As the host, set the discussion topic and understand their challenges, presenting your business solutions through presentations and interactive formats. It's an excellent way to start the Exchange day and set a positive tone for the event.



## VIP Private Dinner

Invite an exclusive group of delegates to a local private dining experience! This includes transport to an elite off-site venue & entertainment sourcing. You'll be able to wow the delegates with a beautiful venue and an even better experience, from wine tasting to cocktail making classes and personalized invitations to selected delegates. This package can also include a bedroom gift drop where you can welcome your guests with a gift drop to their room along with branded menus & table cards, tailor-made cocktails and additional event signage.



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# CONTACT THE TEAM

If you're interested in partnering with the Exchange, feel free to reach out to any member of the CX team – details seen below.



**Emmanuel Olobio**  
Director & Head of CX  
Sponsorship



**Kirsty Barnett**  
Deputy Divisional  
Director – CX Portfolio



**Alex Batten**  
Senior Sponsorship  
Sales Manager



**Harriet Venn**  
Sponsorship Sales  
Manager

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# 2026 CX EXCHANGE CALENDAR



Our Customer Experience events feature a collection of inspiring CX leaders from across the globe's leading brands, who share a common goal – to put the customer at the heart of everything they do. During an unparalleled and immersive two-day experience, attendees hear personal perspectives and practical solutions to unlock business value and transform customer engagements.

**February**  
USA



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**March**  
London, UK



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**May**  
Portugal



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**June**  
USA



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USA



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**October**  
USA



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**October**  
USA



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**December**  
London, UK



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