

# DIGITAL TRANSFORMATION

for Banking, Financial Services & Insurance



# Accelerate Your Digital Strategy Unlock Increased Value Transform Your Business

May 26, 2021

<https://www.intelligentautomation.network/events-digital-transformation-bfsi/>



11:35 AM

## OPENING REMARKS

11:45 AM

### BFSI Workshop: Picking Apart BFSI Processes to Maximize Improvement Potential

In this workshop, Agilify's Lean Six Sigma Master Black Belt, with years of experience with automation technology will lead a robust presentation and discussion, diving into several high-value BFSI process use cases. Our attendees will:

- Explore where their process variances and breakdowns are and understand the impact they are making on their business
- Walk away with experience in what process discovery and analysis look like
- Assess new tools and technologies that improve the speed of the work sets
- Learn how to look at their process improvement potential for automation

**Brent LaRoche, Master Black Belt - Principal, Operational Excellence - Agilify Automation**

12:45 PM

## COMFORT BREAK

12:50 PM

### 6 Crucial Issues Facing Financial Services and Insurance

The global pandemic has been challenging. For financial institutions and insurers, it brought up painful memories of the 2008 financial crisis. And it tested the systems put in place after that crisis. Businesses spent a decade on stress testing and capital rebuilds. The goal was to ensure enough financial resources to weather a downturn. But cash flow pressures and strain on investment portfolios hit hard. This coupled with delayed payments and falling investment demand forced another shift. Financial institutions and insurers had to reimagine their business models — again. In this session we will examine:

- How digital intelligence can help reduce friction and simplify processes.
- Why you should create personalized customer experiences in a virtual environment.
- How digital workers give time back to human knowledge workers for value-add activities

**Cheryl Chiodi, Solutions Marketing Manager, Financial Services, ABBYY**

**Eileen Potter, Solution Marketing Manager, Insurance, ABBYY**

1:20 PM

## COMFORT BREAK

1:25 PM

### Stay Resilient - And Compliant - Through End-to-End Transparency in Your Processes

Under pressure from new digital players, fintechs and insuretechs, the BFSI industries face the challenges that come with being some of the most heavily-regulated industries in the world. While these regulations can easily put a light foot on the brake, slowing down any transformations needed, it is imperative that end-to-end transparency is achieved in order to stay agile for whatever disruption comes around. In this session, hear from a client how they:

- Harmonized operations and business decisions across different departments and business functions
- Automate reporting obligations, making complex manual reporting obsolete

**Client-led case study hosted by Signavio**

**1:55 PM**

**COMFORT BREAK**

**2:00 PM**

**AP Automation as an Enabler of Enterprise-Wise Transformation**

**Client-led presentation hosted by Appzen**

**2:30 PM**

**COMFORT BREAK**

**02:35 PM**

**Panel: Digital Transformation as the Enabler of Company-Wide Change in the BFSI Industry**

Digital transformation is never easy, and certainly never quick. But in the last year with COVID, the need to speed up, or jump into, digital transformation initiatives was front of mind all the way up to the C-Suite. And the digital transformations that have been happening have been wide ranging, from back office automation to front office, customer facing technologies. In this session, our panelists will discuss:

- Pivoting quickly in an environment with many layers of clearance and regulation
- Encouraging and driving a culture of innovation
- Using automation to transform employee roles overwhelmed in administration to clearer high-value tasks

**Vikram Sandhu, VP, Digital, EmiratesNBD**

**Shruti Kakar, Director, Digital Strategy and Platforms, UBS**

**3:05 PM**

**CLOSE OF DAY**