

Speakers Confirmed:

- Tarun Sood, CDO, AMERICAN CENTURY INVESTMENTS
- Venkat Achanta, Chief Technology Data and Analytics Officer, TRANSUNION
- Steve Boras, Chief Data Officer, CITIZENS BANK
- Ellis Wong, Chief Information Security Officer, JST CAPITAL
- Gene Voskov, Chief, Data Analytics & Resources Bureau, Division of Local Services, MASSACHUSETTS DEPARTMENT OF REVENUE
- Andrew Patricio, Chief Data and Al Officer, UNIDOSUS
- Ramila Peiris, Global Head, Data Management, ML and Al Platform, MSAT, SANOFI PASTEUR
- Robi Krempus, Global Head of Al, MANULIFE WEALTH & ASSET MANAGEMENT
- Julia Cherashore, Deputy Superintendent, Data Governance and Management at NEW YORK STATE BANKING
- Sudheesh Kamath, Sudheesh Kamath, Head of Global Data & Al Products, KENVUE
- Victoria Gamerman, Global Head of Digital Transformation COE, BOEHRINGER INGELHEIM
- Thomas Shola, Former Chief Risk Information & Privacy Officer, NORTHERN BANK
- Rita Fuller, Corporate VP Center for Data Science and Artificial Intelligence, NEW YORK LIFE INSURANCE COMPANY
- Amin Assareh, Vice President, Data Science, FIDELITY INVESTMENTS
- Erum Manzoor, Senior Vice President, CITIGROUP
- Sudeep Das, Head of Machine Learning/AI, DOORDASH
- Ram Krishna Gautam, Head of Clinical Platform (EMR, Provider Services and AI Solutions), TELADOC HEALTH

- Rohit Raghunathan, Engineering Manager, DOORDASH
- Marina Printz, Lead Data Scientist, Center for Data Science and AI, NEW YORK LIFE INSURANCE COMPANY
- Sam Marks, Director of Business Strategy & Analytics, BOSTON BRUINS & TD GARDEN
- Diego De Aragao, Senior Vice President, Balance Sheet and Analytics, CITIGROUP
- Barbara Widholm, Vice President, Automation & Artificial Intelligence, STATE STREET
- Zhang Zhang, Head of AI & Risk Analytics, POLEN CAPITAL
- Rafigue Awan, VP Director, Information & Solution Architecture, MFS INVESTMENT MANAGEMENT
- Cecilia Dones, Former Adjunct Professor, COLUMBIA BUSINESS SCHOOL
- Kevin Nickerson, AVP, Analytics & Sales Enablement, CHUBB
- Sadashiv K Vaasista, Senior Director, Analytics, HONEYWELL
- Gurprit Singh, Global Head of Data and Analytics, PARTNERS CAPITAL
- Randall Gordon, Head of Data Governance, CROSS RIVER
- Kevin Kramer, Former SVP, Data Science & Analytics, RECOVERY CENTERS OF AMERICA
- Jasper Cannon, Strategy Consultant, CANNON STRATEGY CONSULTING
- Frederique De Letter, Head of Data Analytics & AI, PLANTE MORAN
- Vatsal Modi, Data Science Leader, DRAFT KINGS
- Rahul Kashyap, Medical Director, Research, SUMMIT HEALTH
- Lin Liu, Director, Data Science, WEALTHSIMPLE
- Tamilla Triantoro, Associate Professor, QUINNIPIAC UNIVERSITY
- Shreesha Jagadeesh, Associate Director of Applied Machine Learning, BEST BUY
- Ferhat Yilmaz, Associate Director, NOVO NORDISK
- Alejandro Zarate Santovena, Global Head of Data Strategy, MARSH
- Linda Hermer, Chief Data Strategy Officer, AMMON LABS
- Khizar Hayat, Chief Data Officer, DAKOTA
- Tyler Frieling, Director PMG DS&S Alternative Data Research, BLACKROCK
- Martin Bernier, Senior Director Quantitative Strategies and Data Science, CAISSE DE DÉPÔT ET PLACEMENT DU QUÉBEC
- Vishal Chaudhry, Chief Data Officer, WASHINGTON STATE HEALTH CARE AUTHORITY
- Alex Chan, Director Venture Analytics, RBCx

	OCTOBER 21, 2025
5:30-6:30pm	Speakers Cocktail Reception – Corinium Partners, Associate Partners, Speakers and Friends (PRIVATE FUNCTION – INVITATION ONLY)
	Speaker Welcome Dinner

		CDAO Fall 2025		
		Day 1 – OCTOBER 22, 2025		
		Industry Focus Tracks		
	Financial Services & Insurance	Retail, CPG & E-Commerce	CDAO Leadership Track (Cross-Industry Track)	
8:00am- 8:50am	Registration & Networking Breakfast			
9:00am- 9:10am	Chairperson's Opening Remarks & Ice Breaker Chairperson's Opening Remarks & Chairperson's Opening Remarks & IceBreaker			
9:10am-	Panel Discussion: Leading the Data	Panel Discussion: Smarter Retail Starts	Panel Discussion: What Makes Data	
9:50am	Revolution in Finance: Turning	volution in Finance: Turning Here: Evolving Leadership in Data, Analytics		
	 Complexity into Confidence How is the role of data leadership evolving in today's financial organizations? What bold moves have you made to turn data into a transformation driver? How do you inspire trust, speed, and innovation across business and tech teams? 	 How are data and AI leaders in retail reshaping decision-making in a world of constant consumer flux? What does true data-driven leadership look like in the age of real-time personalization and omnichannel demand? Are today's data strategies aligned with tomorrow's retail challenges 	 Are we limiting the potential of data leadership by prioritizing control over creativity and experimentation? What if data leadership started with trust, empowerment, and storytelling — rather than policies and compliance? Can data leaders truly drive transformation if they don't first 	
	Panelists:	— or are we optimizing for the past?	lead cultural change within their organizations?	

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	Ellis Wong, Chief Information Security Officer, JST CAPITAL Amin Assareh, Vice President, Data Science, FIDELITY INVESTMENTS Zhang Zhang, Head of AI & Risk Analytics, POLEN CAPITAL	 How can retail leaders foster a culture where analytics and Al are not just tools, but catalysts for innovation and growth? Panelists: Shreesha Jagadeesh, Associate Director of Applied Machine Learning, BEST BUY Vatsal Modi, Data Science Leader, DRAFT KINGS 	 Why aren't more data leaders borrowing bold ideas from outside their field — and what's the cost of staying in the bubble? Panelists: Gene Voskov, Chief, Data Analytics & Resources Bureau, Division of Local Services, MASSACHUSETTS DEPARTMENT OF REVENUE Randall Gordon, Head of Data Governance, CROSS RIVER Ferhat Yilmaz, Associate Director, NOVO NORDISK Tyler Frieling, Director - PMG - DS&S Alternative Data Research, BLACKROCK
9:50am-	Presentation: The Future of Data	Presentation: Building a High-Impact	Presentation: Al-Powered Intelligence:
10:20am	Management in Financial Services:	Analytics Function to Drive Value in Retail	Redefining Enterprise Analytics for the
	How Can you Take Advantage of	and CPG	Next Era
	 Anticipating change and managing uncertainty, a look at five fast growing trends of data management in Financial Services Strategies to invest in those trends that are most relevant to your organization How data & analytics leaders need to adapt to succeed in the future 	 Aligning analytics goals with business objectives to maximize ROI in retail and CPG. Leveraging advanced analytics and AI to drive customer insights, personalization, and operational efficiency. Building a culture of data-driven decision-making across teams to ensure long-term success 	 Exploring how AI empowers organizations to extract deeper, more actionable insights from complex data sets Leveraging AI to seamlessly bridge the gap between raw data and real-time, impactful decision-making Overcoming hurdles like data integration, quality, and skill gaps to fully realize the benefits of AI in enterprise analytics

10:20am- 10:50am	Diego De Aragao, Senior Vice President, Balance Sheet and Analytics Citigroup Presentation: Exploring Opportunities and Challenges in terms of Capturing ROI when Developing and Deploying AI within FSI How can possible areas for improvement in AI pipelines be identified? How can we optimize engineering, infrastructure, culture, teams and decision- making to see increased ROI (higher revenue, cost reduction, operational efficiency, value gains)? Overcoming Barriers to ROI:	Sudheesh Kamath, Head of Global Data & Al Products KENVUE Presentation: The Innovation Catalyst: Leading Data Teams to Drive New Business Models Identifying opportunities for datadriven product Innovation and service enhancement in retail and e-commerce Leading experimentation with new data sources and analytical techniques. Fostering a culture of data-driven entrepreneurship within the organization	Marina Printz, Lead Data Scientist, Center for Data Science and AI NEW YORK LIFE INSURANCE COMPANY Presentation: Transforming Business with AI & Data: The Leadership Imperative Leveraging AI to drive innovation in data management The key leadership skills required to manage AI-powered transformations Overcoming resistance to change and driving AI adoption across departments
10:50am -	Addressing data quality, integration, and change management Networking Break		
11:20 am	Discussion Cooking Through the	Discussion Craum Dans discust has Future	Discussion Consult The Future of Date
11:20am- 11:50am	Discussion Group: Seeing Through the Madness: How to Actually Get AI Accepted in Finance How to see past the hype and truly understand where AI can transform	Discussion Group: Decoding the Future Consumer: The Data Compass for Retail, CPG & E-Commerce" • Understanding the evolving consumer behaviors through data- driven insights	Discussion Group: The Future of Data Leadership: Anticipating Change in the Next Decade • Predicting the next wave of data leadership challenges and opportunities

	 Anticipate future regulations to avoid losing out Developing a culture of AI acceptance and trust 	 Leveraging predictive analytics to anticipate future trends and drive strategic decisions Building a consumer-first data strategy to enhance personalization and loyalty 	 How data leaders can prepare for the changing technological landscape The evolving role of the CDAO in driving business growth and innovation
	Co-Moderator: Barbara Widholm, Vice President, Automation & Artificial Intelligence, STATE STREET	Co-Moderator: Shreesha Jagadeesh, Associate Director of Applied Machine Learning, BEST BUY	Co-Moderator: PromptQL
11:50am- 12:20pm	Presentation: The Human Glue in Al: How Soft Skills Drive Impact in Financial Services Bridging the gap between data teams and business leadership Enabling scalable Al through cross-functional collaboration Using emotional intelligence to lead change and foster adoption Positioning soft skills as a strategic advantage in Al- driven initiatives Steve Boras, Chief Data Officer, CITIZENS BANK	Presentation: Seamless by Design: Simplifying Customer Data Integration to Power Frictionless E-Commerce Journeys	Presentation: Data Leadership in the Age of Transformation: How to Thrive, Not Just Survive • The evolving role of the CDAO in navigating disruption and embracing data-driven transformation. • Transitioning from a data provider to a strategic advisor within the organization. • Essential leadership skills to foster a culture of data empowerment across teams Andrew Patricio, Chief Data and Al Officer, UNIDOSUS
12:20pm- 1:30pm -	Lunch & Networking		PRIVATE LUNCH ROUDTABLE
-		MAIN EVENT KICK-OFF	
1:30pm-	EVENT KICKOFF WITH CHAIR		

1:40pm					
1:40pm-	Opening Panel: What are The Key Data Management Issues Keeping Leaders Awake in 2025?				
2:20pm	 What are the most pressing challenges data management leaders face in optimizing data strategies to drive informed decision-making in 2025? 				
	How can data management leaders effectively integrate emerging technologies like AI and machine learning to enhance data governance and decision-making processes?				
	 What are the best practices for balancing the need for data accessibility with the imperative of maintaining robust data security and compliance? 				
	• In a rapidly evolving data landscape, how can leaders ensure continuous data quality and integrity to support long-term strategic goals and real-time decision-making?				
	Panelists: Julia Cherashore, Deputy Superintendent, Data Governance and Management, NEW YORK STATE BANKING				
	Sam Marks, Director of Business Strategy & Analytics, BOSTON BRUINS & TD GARDEN				
	Zhang Zhang, Head of Al & Risk Analytics, POLEN CAPITAL				
	Rafique Awan, VP Director, Information & Solution Architecture, MFS INVESTMENT MANAGEMENT				
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2:20pm –	Keynote Presentation: Rethinking Data Lineage: Aligning Teams for Cost and Performance Optimization				
2:50pm	Break silos by creating shared visibility into data flows				
	Use lineage to reduce duplication, inefficiencies, and cost				
	Align business, tech, and data roles through end-to-end traceability				
	Victoria Gamerman, Global Head of Digital Transformation COE BOEHRINGER INGELHEIM				
2:50pm-	Keynote Presentation: Leveraging Al for Good: Empowering Data Leaders to Create Lasting Positive Impact				
3:20pm	How can data and AI leaders ensure ethical and responsible AI deployment while still driving innovation?				
·	What are some real-world examples where AI has been used to generate measurable social or environmental impact in financial services?				
	How can organizations empower their data teams to prioritize "AI for Good" initiatives alongside business objectives?				
	What frameworks or partnerships are essential to scaling AI solutions that serve the greater good across industries?				

3:20pm-	Networking Break			
3:50pm 3:50pm - 4:30pm	Panel Discussion: Transforming Data into Strategic Assets: The Critical Importance of Data Quality for Generative AI Applications: Practical Strategies for Success			
	 How can AI help produce the trustworthy data business What role can AI play in enhancing data quality, governated Can AI agents do most of the work? What are data products and how do they enable scalability 	ance, and operational efficiency?		
4:30pm - 5:00pm	 Keynote Presentation: Sustainability as Strategy: Unlocking Business Value through ESG in Tech Al & Analytics for Sustainable Impact: Turning data into actionable ESG strategies Mastering ESG Reporting: Staying ahead of evolving regulations and stakeholder expectations Innovating for a Greener Tomorrow: How emerging technologies are driving sustainable transformation 			
5:00pm - 5:40pm	Networking Roundtables Meet your fellow attendees and engage in lively discussions with leaders, and visionaries on the diverse dimensions of data, analy offers a unique opportunity to share insights and explore various technology.	tics and AI. Each roundtable	Dell Technologies Capital Private Reception (5:00pm- 6:00pm)	
	Roundtable A – Mo Data, Mo Problems Let's talk about how you have too much data – new, old and everything in between and what to do with it	_	et" & Responsible AI uss how to avoid bias and model uracies	
	Roundtable C: Teamwork Makes the Dream Work Hiring, re-skilling, finding talent for your team & creating the right culture in the process	Roundtable D: Treasure Ho Let's talk about how to monetize new ways of lo		
5:40pm-7:00	l Opm <i>CORINIUM Cocktail Recep</i>	l tion & Awards		

	CDAO Fall 2025		
	Day 2 — OCTOBER 23, 2025 Day 2 Main Stage		
8:20am- 8:50am	Registration & Networking Breakfast		
8:50am – 9:00am	Chair's opening remarks		
9:00am- 9:40am	Day 2 Opening Panel Discussion: Accelerating Digital Transformation Through Effective Data Management What are the biggest data management challenges that slow down digital transformation, and how can they be overcome? How can organizations balance data quality, governance, and scalability to accelerate digital initiatives? What role do AI and automation play in enhancing data management for a seamless digital transformation? How can businesses effectively measure the impact of their data management strategies on digital growth? Panelists: Venkat Achanta, Chief Technology Data and Analytics Officer, TRANSUNION Ramila Peiris, Global Head, Data Management, ML and AI Platform, MSAT, SANOFI PASTEUR Rafique Awan, VP Director, Information & Solution Architecture, MFS INVESTMENT MANAGEMENT Randall Gordon, Head of Data Governance, CROSS RIVER Gurprit Singh, Global Head of Data and Analytics, PARTNERS CAPITAL		
9:40am- 10:10am	 Keynote Presentation: The Future-Facing CDAO: Leading with Vision, Velocity, and Data-Driven Impact How future-focused CDAOs are aligning data strategy with long-term business goals, customer-centric innovation, and emerging technologies like GenAI Building agile data organizations that can move fast—balancing governance with experimentation, and enabling real-time, high-impact decisions Translating data investments into tangible business outcomes by embedding analytics into core operations, managing risk, and demonstrating value to the C-suite 		

10:10am- 10:40am	 Keynote Presentation: Competing in AI with a Game-Changing Platform Mindset Solving complex data challenges with a unified, scalable platform that balances governance and agility Enabling AI-powered collaboration across business and technical teams to accelerate innovation Real-world applications of AI and machine learning in modern data management and decision-making Building resilient, future-ready data ecosystems that support continuous learning and adaptability Lessons from TransUnion's journey in adopting a platform-first approach to AI transformation Venkat Achanta, Chief Technology Data and Analytics Officer TransUnion 		
10:40am- 11:10am	Networking Break		
11:10am- 11:50am	Panel Discussion: Al is Changing the Relationship Between Data and the Business, as CDO/CDAO Are You Ready? • How to support the transition from decision support (charts and graphs) to decision automation (models) • Managing accountability for the Amplified Value and Amplified Risk of Al (Al Governance) • Scaling Al despite unprecedented operational complexity (Al Change Management) • How to embrace the CDO/CDAO responsibility as the Enterprise Al leader (Al Portfolio Management) Panelists: Sam Marks, Director of Business Strategy & Analytics, BOSTON BRUINS & TD GARDEN Frederique De Letter, Head of Data Analytics & Al, PLANTE MORAN Lin Liu, Director, Data Science, WEALTHSIMPLE Gurprit Singh, Global Head of Data and Analytics, PARTNERS CAPITAL		
11:50am- 12:30pm	Track Panel Discussion: From Data Analyzer to Decision Enabler to Business Driver - How to Elevate Your Organization's Data Analytics Maturity • How do you know when your organization is ready to move beyond basic analytics? • What's needed to position analytics as a core business driver, not just a support tool?	Track Panel Discussion: Proving the Value: Measuring and Communicating the ROI of Analytics Initiatives • What metrics have been most effective in demonstrating the ROI of analytics projects in your organization? • How do you tailor the value story of analytics for different	Track Panel Discussion: How Productization of Data Brings in Efficiency and Scalability that Today's Business Require? • What does "data productization" involve, and how does it transform traditional data management? • What key factors make a data product scalable and efficient in

12:30pm- 1:30pm	 How do you balance innovation and governance as analytics capabilities grow? What are the main blockers to analytics maturity—and how have you overcome them? Panelists: Rita Fuller, Corporate VP Center for Data Science and Artificial Intelligence, NEW YORK LIFE INSURANCE COMPANY Jasper Cannon, Strategy Consultant, CANNON STRATEGY CONSULTING Kevin Nickerson, AVP, Analytics & Sales Enablement, CHUBB Alex Chan, Director Venture Analytics, RBCx 	operations, What strate analytics fro perception driver? Panelists: Sadashiv K Vaasista, Analytics, HONEYW	gies help shift om a cost center to a business value Senior Director, ELL er SVP, Data Science ERY CENTERS OF	today's fast-paced business environment? What are the main challenges in productizing data, and what strategies can overcome them? How does productizing data enhance decision-making and drive measurable business results Panelists: Diego De Aragao, Senior Vice President, Balance Sheet and Analytics, CITIGROUP Gene Voskov, Chief, Data Analytics & Resources Bureau, Division of Local Services, MASSACHUSETTS DEPARTMENT OF REVENUE Sudheesh Kamath, Sudheesh Kamath, Head of Global Data & Al Products, KENVUE Vatsal Modi, Data Science Leader, DRAFT KINGS Private Lunch
1.50рт				
		Eco-System Track		
1.20	Data Dive – All things Data			Wonderland – All things Al
1:30- 2:10pm	Panel Discussion: Building a Data-Driven Cultur into Everyday Practice • How executive support and consistent organizational mindset around data • Translating high-level data goals into proceed tools, and workflows • Equipping employees with the right data to make informed decisions at every le	messaging shape ractical behaviors, ta literacy and tools	 and Best Practices Defining whe crucial for a How should Exploring he preparing the 	reparing Your Data for Al Success: Strategies and constitutes Al-ready data and why it is achieving successful Al outcomes I you do this, and what are others doing? bow clients and vendors are currently heir data for Al hes and recommendations for getting data Al-

	 Using success stories and feedback loops to reinforce a culture of data use and continuous improvement Panelists: Linda Hermer, Chief Data Strategy Officer, AMMON LABS Thomas Shola, Former Chief Risk Information & Privacy Officer NORTHERN BANK Jasper Cannon, Strategy Consultant, CANNON STRATEGY CONSULTING 	Panelists: Lin Liu, <i>Director, Data Science</i> , WEALTHSIMPLE Khizar Hayat, Chief Data Officer, DAKOTA
2:10pm- 2:40pm	Presentation: Linking Data Strategy to Business Strategy - How Data Projects can be Prioritized Based on their Potential Impact on Key Business Objectives • Strategies to generate revenue from data, such as through data products, services, insights, or a modern data- and analytics platform • How a modern data infrastructure and technologies supports the business strategy • Strategies and experience with fostering a culture where data is valued and used effectively by all employees Thomas Shola, Former Chief Risk Information & Privacy Officer NORTHERN BANK	Presentation: From Reactive to Remarkable: The Next Frontier of Al-Driven Customer Experience • How Al Personalization is Reshaping Customer Engagement • Chatbots vs. Human Touch: Striking the Right Balance • Al Ethics in Customer Interactions Besa H. Bauta, Chief Information Officer THE JEWISH BOARD
2:40pm- 3:10pm	Presentation: Mastering Data Governance: Frameworks, Policies, and Processes for Unwavering Quality and Compliance Roles and Responsibilities Within Data Governance Structure • Developing policies for data quality, security, and privacy • Designing processes for data collection, storage, and management • Best practices for data integration and interoperability	Presentation: Conversational AI Evolution: A Product Primer on What it Takes to Build Conversation Driven Digital Applications that are Future Proofed and Meet Enterprise User Needs • Pre ChatGPT: Natural Language Understanding (NLU) driven architectures and why they were successful • ChatGPT: Advent of large language models and their impact on conversational AI design, development, and

	deployment. Do we abandon the old in pursuit of the new? • Post ChatGPT: How do enterprise conversational AI systems evolve to meet existing and future challenges. What are some good design principles to keep in mind while building for the future?
3:10pm-	Keynote Presentation: Al Governance at Washington State Health Care Authority
3:40pm	This session will explore how the Washington State Health Care Authority (HCA) is taking an ethics-based approach to governing Artificial Intelligence (AI) within the Medicaid system. HCA has developed an AI Ethics Framework as part of its broader data governance strategy, aiming to ensure responsible, transparent, and client-centered use of AI. The presentation will highlight key elements of the framework, including the review process for AI initiatives and tools to guide ethical decision-making. Vishal Chaudhry, Chief Data Officer, WASHINGTON STATE HEALTH CARE AUTHORITY
3:40pm- 4:10pm	 Keynote Presentation: Data Storytelling- What Stories are Worthwhile and What is Just Noise? How Can you Tell the Most Effective Story Using your Data? How to separate valuable data stories from irrelevant noise to focus on what truly matters? Turning complex data into a compelling story that resonates with your audience Using visuals to simplify data and enhance storytelling effectiveness Ensuring your data narrative drives actionable insights and supports strategic decisions Sadashiv K Vaasista, Senior Director, Analytics, HONEYWELL
4:10pm- 4:50pm	 Closing Panel Discussion: Understanding the Need for Speed: Making Al a Priority for Every Part of the Business Why being slow to adopt Al can hinder a company's ability to remain competitive in today's rapidly evolving business landscape Examples of Al tools and strategies that are revolutionizing processes, improving decision-making, and enhancing overall business agility Addressing challenges like resistance to change, skill gaps, and the need for cross-departmental collaboration to successfully implement Al

Panelists:

Andrew Patricio, *Chief Data and Al Officer*, **UNIDOSUS**Robi Krempus, *Global Head of Al*, **MANULIFE WEALTH & ASSET MANAGEMENT**Frederique De Letter, *Head of Data Analytics & Al*, **PLANTE MORAN**Jasper Cannon, *Strategy Consultant*, **CANNON STRATEGY CONSULTING**