



OCTOBER 22-23, 2025

CDAO FALL

▶ Connecting you to what's next in data

Speakers Confirmed:

- Tarun Sood, *CDO*, **AMERICAN CENTURY INVESTMENTS**
- Venkat Achanta, *Chief Technology Data and Analytics Officer*, **TRANSUNION**
- Besa H. Bauta, *Chief Information Officer | Information Technology Services*, **THE JEWISH BOARD**
- Gene Voskov, *Chief, Data Analytics & Resources Bureau, Division of Local Services*, **MASSACHUSETTS DEPARTMENT OF REVENUE**
- Andrew Patricio, *Chief Data and AI Officer*, **UNIDOSUS**
- Ramila Peiris, *Global Head, Data Management, ML and AI Platform, MSAT*, **SANOFI PASTEUR**
- Julia Cherashore, *Deputy Superintendent, Data Governance and Management* at **NEW YORK STATE BANKING**
- Sudheesh Kamath, *Sudheesh Kamath, Head of Global Data & AI 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**
- Rafique 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**

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

CDAO Fall 2025 Day 1 – OCTOBER 22, 2025			
Industry Focus Tracks			
	<i>Financial Services & Insurance</i>	<i>Retail, CPG & E-Commerce</i>	<i>CDAO Leadership Track (Cross-Industry Track)</i>
8:00am-8:50am	<i>Registration & Networking Breakfast</i>		

9:00am-9:10am	Chairperson's Opening Remarks & Ice Breaker	Chairperson's Opening Remarks & IceBreaker	Chairperson's Opening Remarks & IceBreaker
9:10am-9:50am	<p>Panel Discussion: Leading the Data Revolution in Finance: Turning Complexity into Confidence</p> <ul style="list-style-type: none"> • 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? <p>Panelists: Amin Assareh, <i>Vice President, Data Science</i>, FIDELITY INVESTMENTS Zhang Zhang, <i>Head of AI & Risk Analytics</i>, POLEN CAPITAL</p>	<p>Panel Discussion: Smarter Retail Starts Here: Evolving Leadership in Data, Analytics & AI</p> <ul style="list-style-type: none"> • 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 — or are we optimizing for the past? • How can retail leaders foster a culture where analytics and AI are not just tools, but catalysts for innovation and growth? <p>Panelists: Vatsal Modi, <i>Data Science Leader</i>, DRAFT KINGS</p>	<p>Panel Discussion: What Makes Data Leaders Successful? Let's Find Out!</p> <ul style="list-style-type: none"> • 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 lead cultural change within their organizations? • Why aren't more data leaders borrowing bold ideas from outside their field — and what's the cost of staying in the bubble? <p>Panelists: Gene Voskov, <i>Chief, Data Analytics & Resources Bureau, Division of Local Services</i>, MASSACHUSETTS DEPARTMENT OF REVENUE Randall Gordon, <i>Head of Data Governance</i>, CROSS RIVER</p>

9:50am-10:20am	<p>Presentation: The Future of Data Management in Financial Services: How Can you Take Advantage of Emerging Trends?</p> <ul style="list-style-type: none"> 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 <p>Diego De Aragao, <i>Senior Vice President, Balance Sheet and Analytics</i> Citigroup</p>	<p>Presentation: Building a High-Impact Analytics Function to Drive Value in Retail and CPG</p> <ul style="list-style-type: none"> 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 <p>Sudheesh Kamath, <i>Head of Global Data & AI Products</i> KENVUE</p>	<p>Presentation: AI-Powered Intelligence: Redefining Enterprise Analytics for the Next Era</p> <ul style="list-style-type: none"> 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 <p>Marina Printz, <i>Lead Data Scientist, Center for Data Science and AI</i> NEW YORK LIFE INSURANCE COMPANY</p>
10:20am-10:50am	<p>Presentation: Exploring Opportunities and Challenges in terms of Capturing ROI when Developing and Deploying AI within FSI</p> <ul style="list-style-type: none"> 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 	<p>Presentation: The Innovation Catalyst: Leading Data Teams to Drive New Business Models</p> <ul style="list-style-type: none"> Identifying opportunities for data-driven 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 	<p>Presentation: Transforming Business with AI & Data: The Leadership Imperative</p> <ul style="list-style-type: none"> 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

	<p>reduction, operational efficiency, value gains)?</p> <ul style="list-style-type: none"> Overcoming Barriers to ROI: Addressing data quality, integration, and change management 		
10:50am - 11:20 am	<i>Networking Break</i>		
11:20am-11:50am	<p><i>Discussion Group: Seeing Through the Madness: How to Actually Get AI Accepted in Finance</i></p> <ul style="list-style-type: none"> How to see past the hype and truly understand where AI can transform Anticipate future regulations to avoid losing out Developing a culture of AI acceptance and trust <p>Moderator: Barbara Widholm, <i>Vice President, Automation & Artificial Intelligence, STATE STREET</i></p>	<p><i>Discussion Group: Decoding the Future Consumer: The Data Compass for Retail, CPG & E-Commerce"</i></p> <ul style="list-style-type: none"> Understanding the evolving consumer behaviors through data-driven insights Leveraging predictive analytics to anticipate future trends and drive strategic decisions Building a consumer-first data strategy to enhance personalization and loyalty 	<p><i>Discussion Group: The Future of Data Leadership: Anticipating Change in the Next Decade</i></p> <ul style="list-style-type: none"> Predicting the next wave of data leadership challenges and opportunities How data leaders can prepare for the changing technological landscape The evolving role of the CDAO in driving business growth and innovation
11:50am-12:20pm	<p>Presentation: Harnessing the Power of Real-Time Data for Agile Financial Decision-Making</p> <ul style="list-style-type: none"> How to build a real-time data infrastructure that supports decision-making at speed and scale 	<p>Presentation: Seamless by Design: Simplifying Customer Data Integration to Power Frictionless E-Commerce Journeys</p> <ul style="list-style-type: none"> Unifying customer data for real-time, cross-channel experiences Reducing integration complexity with modern tools and APIs 	<p>Presentation: Data Leadership in the Age of Transformation: How to Thrive, Not Just Survive</p> <ul style="list-style-type: none"> The evolving role of the CDAO in navigating disruption and embracing data-driven transformation.

	<ul style="list-style-type: none">• Practical applications of real-time analytics in risk management, fraud detection, and financial forecasting• Balancing real-time data flow with data governance: Ensuring accuracy, security, and compliance	<ul style="list-style-type: none">• Driving personalization through connected data• Building trust with data quality and transparency	<ul style="list-style-type: none">• Transitioning from a data provider to a strategic advisor within the organization.• Essential leadership skills to foster a culture of data empowerment across teams <p>Andrew Patricio, <i>Chief Data and AI Officer</i>, UNIDOSUS</p>
12:20pm-1:30pm -	Lunch & Networking		PRIVATE LUNCH ROUDTABLE
MAIN EVENT KICK-OFF			
1:30pm-1:40pm	EVENT KICKOFF WITH CHAIR		
1:40pm-2:20pm	<p>Opening Panel: What are The Key Data Management Issues Keeping Leaders Awake in 2025?</p> <ul style="list-style-type: none">• 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? <p>Panelists: Julia Cherashore, <i>Deputy Superintendent, Data Governance and Management</i>, NEW YORK STATE BANKING Sam Marks, <i>Director of Business Strategy & Analytics</i>, BOSTON BRUINS & TD GARDEN Zhang Zhang, <i>Head of AI & Risk Analytics</i>, POLEN CAPITAL Rafique Awan, <i>VP Director, Information & Solution Architecture</i>, MFS INVESTMENT MANAGEMENT</p>		

2:20pm – 2:50pm	<p>Keynote Presentation: From Reactive to Remarkable: The Next Frontier of AI-Driven Customer Experience</p> <ul style="list-style-type: none"> • How AI Personalization is Reshaping Customer Engagement • Chatbots vs. Human Touch: Striking the Right Balance • AI Ethics in Customer Interactions <p>Besa H. Bauta, <i>Chief Information Officer</i> THE JEWISH BOARD</p>
2:50pm- 3:20pm	<p>Keynote Presentation: Rethinking Data Lineage: Aligning Teams for Cost and Performance Optimization</p> <ul style="list-style-type: none"> • 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
3:20pm- 3:50pm	<i>Networking Break</i>
3:50pm - 4:30pm	<p>Panel Discussion: From Data Assets to Data Products: How Productization of Data Brings in Efficiency and Scalability that Today's Business Require?</p> <ul style="list-style-type: none"> • What does "data productization" involve, and how does it transform traditional data management? • What key factors make a data product scalable and efficient in 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 <p>Panelists: Diego De Aragao, <i>Senior Vice President, Balance Sheet and Analytics</i>, CITIGROUP Gene Voskov, <i>Chief, Data Analytics & Resources Bureau, Division of Local Services</i>, MASSACHUSETTS DEPARTMENT OF REVENUE Sudheesh Kamath, <i>Sudheesh Kamath, Head of Global Data & AI Products</i>, KENVUE Vatsal Modi, <i>Data Science Leader</i>, DRAFT KINGS</p>
4:30pm - 5:00pm	<p>Keynote Presentation: Sustainability as Strategy: Unlocking Business Value through ESG in Tech</p> <ul style="list-style-type: none"> • AI & 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 <i>Meet your fellow attendees and engage in lively discussions with fellow professionals, thought leaders, and visionaries on the diverse dimensions of data, analytics and AI. Each roundtable offers a unique opportunity to share insights and explore various aspects of this transformative technology.</i>	<i>Dell Technologies Capital Private Reception (5:00pm-6:00pm)</i>
	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	Roundtable B: “Skynet” & Responsible AI Let's talk about models and discuss how to avoid bias and model in accuracies
	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 Hunt: Finding Hidden Profits Let's talk about how to monetize your data & AI programs. Find new ways of looking at data
5:40pm-7:00pm	CORINIUM Cocktail Reception & Awards	

CDAO Fall 2025 Day 2 – OCTOBER 23, 2025	
Day 2 Main Stage	
8:20am-8:50am	<i>Registration & Networking Breakfast</i>
8:50am – 9:00am	<i>Chair's opening remarks</i>
9:00am-9:40am	Day 2 Opening Panel Discussion: Accelerating Digital Transformation Through Effective Data Management <ul style="list-style-type: none"> • 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?

	<ul style="list-style-type: none"> How can businesses effectively measure the impact of their data management strategies on digital growth? <p>Panelists: Venkat Achanta, <i>Chief Technology Data and Analytics Officer, TransUnion</i> Rafique Awan, <i>VP Director, Information & Solution Architecture, MFS INVESTMENT MANAGEMENT</i> Randall Gordon, <i>Head of Data Governance, CROSS RIVER</i></p>
9:40am-10:10am	<p>Keynote Presentation: The Future-Facing CDAO: Leading with Vision, Velocity, and Data-Driven Impact</p> <ul style="list-style-type: none"> 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	<p>Keynote Presentation: Competing in AI with a Game-Changing Platform Mindset</p> <ul style="list-style-type: none"> 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 <p>Venkat Achanta, <i>Chief Technology Data and Analytics Officer</i> TransUnion</p>
10:40am-11:10am	<i>Networking Break</i>
11:10am-11:50am	<p>Panel Discussion: AI is Changing the Relationship Between Data and the Business, as CDO/CDAO Are You Ready?</p> <ul style="list-style-type: none"> 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 AI (AI Governance) Scaling AI despite unprecedented operational complexity (AI Change Management) How to embrace the CDO/CDAO responsibility as the Enterprise AI leader (AI Portfolio Management)

	<p>Panelists: Sam Marks, <i>Director of Business Strategy & Analytics</i>, BOSTON BRUINS & TD GARDEN Frederique De Letter, <i>Head of Data Analytics & AI</i>, PLANTE MORAN</p>		
11:50am-12:30pm	<p>Track Panel Discussion: From Data Analyzer to Decision Enabler to Business Driver - How to Elevate Your Organization's Data Analytics Maturity</p> <ul style="list-style-type: none"> • 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? • 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? <p>Panelists: Rita Fuller, <i>Corporate VP Center for Data Science and Artificial Intelligence</i>, NEW YORK LIFE INSURANCE COMPANY Jasper Cannon, <i>Strategy Consultant</i>, CANNON STRATEGY CONSULTING</p>	<p>Track Panel Discussion: Proving the Value: Measuring and Communicating the ROI of Analytics Initiatives</p> <ul style="list-style-type: none"> • How to align analytics KPIs with broader business goals to track meaningful impact • Balancing financial outcomes (e.g., cost savings, revenue growth) with intangible benefits like improved decision-making and customer experience • Balancing financial outcomes (e.g., cost savings, revenue growth) with intangible benefits like improved decision-making and customer experience • Balancing financial outcomes (e.g., cost savings, revenue growth) with intangible benefits like improved decision-making and customer experience <p>Panelists: Sadashiv K Vaasista, <i>Senior Director, Analytics</i>, HONEYWELL Kevin Kramer, <i>Former SVP, Data Science & Analytics</i>, RECOVERY CENTERS OF AMERICA</p>	<p>Track Panel Discussion: Scaling Data & Analytics to Accelerate Your AI Journey</p> <ul style="list-style-type: none"> • What are the foundational elements needed to successfully scale data and analytics in support of AI initiatives? • How can organizations strike the right balance between speed, scalability, and governance when building AI-ready data architectures? • What lessons have you learned from scaling AI across the enterprise, and what would you do differently in hindsight?

12:30pm-1:30pm	Lunch & Networking in the Exhibit Hall		Private Lunch
Eco-System Tracks			
	Data Dive – All things Data	AI Wonderland – All things AI	
1:30-2:10pm	<p>Panel Discussion: Building a Data-Driven Culture: Turning Vision into Everyday Practice</p> <ul style="list-style-type: none">• How executive support and consistent messaging shape organizational mindset around data• Translating high-level data goals into practical behaviors, tools, and workflows• Equipping employees with the right data literacy and tools to make informed decisions at every level• Using success stories and feedback loops to reinforce a culture of data use and continuous improvement <p>Panelists: Thomas Shola, <i>Former Chief Risk Information & Privacy Officer</i> NORTHERN BANK Jasper Cannon, <i>Strategy Consultant, CANNON STRATEGY CONSULTING</i></p>	<p>Panel Discussion: Preparing Your Data for AI Success: Strategies and Best Practices</p> <ul style="list-style-type: none">• Defining what constitutes AI-ready data and why it is crucial for achieving successful AI outcomes• How should you do this, and what are others doing?• Exploring how clients and vendors are currently preparing their data for AI• Best practices and recommendations for getting data AI-ready	
2:10pm-2:40pm	<p>Presentation: Linking Data Strategy to Business Strategy - How Data Projects can be Prioritized Based on their Potential Impact on Key Business Objectives</p> <ul style="list-style-type: none">• 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	<p>Presentation Leveraging AI for Good: Empowering Data Leaders to Create Lasting Positive Impact</p> <ul style="list-style-type: none">• 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?	

	<ul style="list-style-type: none"> Strategies and experience with fostering a culture where data is valued and used effectively by all employees <p>Thomas Shola, <i>Former Chief Risk Information & Privacy Officer</i> NORTHERN BANK</p>	<ul style="list-style-type: none"> 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?
2:40pm-3:10pm	<p>Presentation: Mastering Data Governance: Frameworks, Policies, and Processes for Unwavering Quality and Compliance Roles and Responsibilities Within Data Governance Structure</p> <ul style="list-style-type: none"> Developing policies for data quality, security, and privacy Designing processes for data collection, storage, and management Best practices for data integration and interoperability 	<p>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</p> <ul style="list-style-type: none"> 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-3:40pm	<p>Keynote Presentation: Data Storytelling- What Stories are Worthwhile and What is Just Noise? How Can you Tell the Most Effective Story Using your Data?</p> <ul style="list-style-type: none"> 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 <p>Sadashiv K Vaasista, <i>Senior Director, Analytics</i>, HONEYWELL</p>	
3:40pm-4:10pm	<p>Closing Panel Discussion: Understanding the Need for Speed: Making AI a Priority for Every Part of the Business</p> <ul style="list-style-type: none"> Why being slow to adopt AI can hinder a company’s ability to remain competitive in today’s rapidly evolving business landscape 	

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| | <ul style="list-style-type: none">• Examples of AI 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 AI |
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Panelists:

Jasper Cannon, *Strategy Consultant*, **CANNON STRATEGY CONSULTING**

Frederique De Letter, *Head of Data Analytics & AI*, **PLANTE MORAN**

Andrew Patricio, *Chief Data and AI Officer*, **UNIDOSUS**