

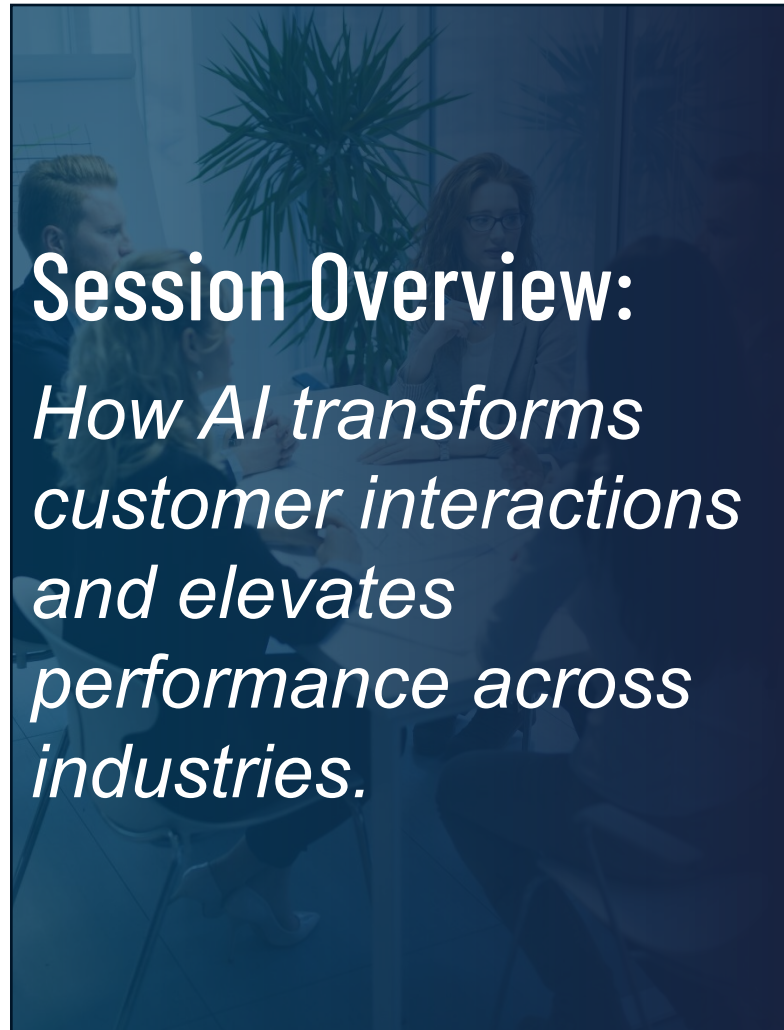
# NACD: AI IN CUSTOMER EXPERIENCE

FROM FINANCE TO FRONTLINES: AI FOR EVERY CUSTOMER-FACING FUNCTION

September 17, 2025

**MORNINGSTAR**<sup>®</sup> **protiviti**<sup>®</sup>  
Global Business Consulting

# Board Level Questions we will Answer



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How can we use AI to gain a true competitive advantage, not just improve productivity or efficiency?

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How is AI changing decision-making and customer engagement?

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What use cases matter most in customer experience?

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# Agenda & Speakers

AI Landscape and the Opportunity (5 min)

Conversational AI Demonstration & Discussion (25 min)

Questions & Considerations (10 min)



**Tom Andreesen**

**Managing Director**  
Global Microsoft  
Leader  
**Protiviti**



**Mark Rackley**

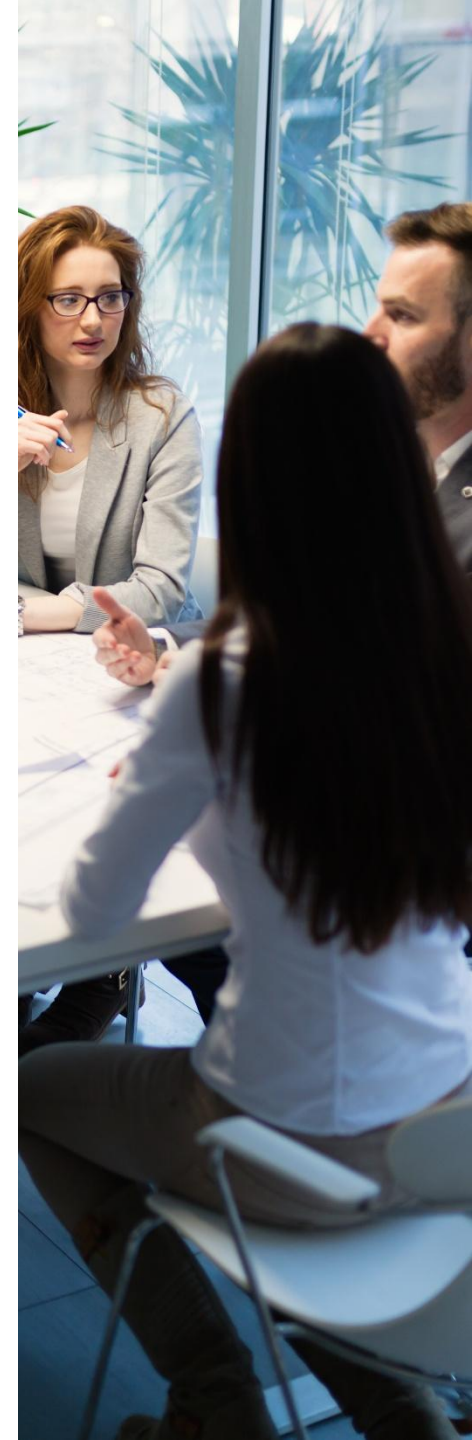
**Director**  
Microsoft Practice,  
Microsoft MVP  
**Protiviti**



**Marc DeMoss**





**Head of Product at**  
**Morningstar**

**Morningstar**



# Morningstar + Protiviti: A Partnership Created to Help Customers



	Global Business Consulting
	11,000 + Employees Across 90 + offices & 23 Countries
	Risk & Compliance Heritage
	Business Centric Data & AI programs







**Knowledgeable & Trusted Advisors**

**Proven Impact of business Outcomes**

**Independent, High-Quality Data**

**Empowering Decisions & Action**



	Global Leader in Investment Research and Data Analytics
	12,000+ Employees Across 32 Countries
	Innovative Data & Software Platforms
	Serving financial advisors, wealth management firms, & asset managers/owners

# AI Value is Already Here

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**Productivity gains** are the standard

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Early adopters are **embedding AI in the business**

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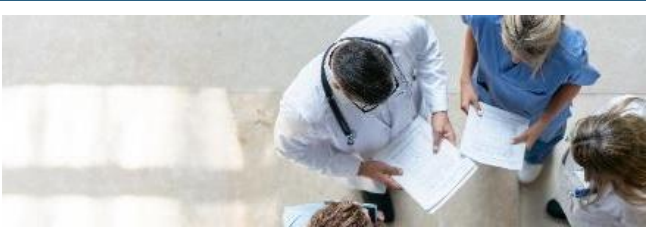



**Boards must guide adoption** to maximize value

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# How Conversational AI Transforms Customer Roles

<p><b>Sales Professional</b> <i>Proactive, data-driven offers</i></p>	 
	<p><b>Customer Service Provider</b> <i>Personalized support experience</i></p>
<p><b>Healthcare Provider</b> <i>Faster, more accurate notes</i></p>	 
	<p><b>Wealth Advisor &amp; Investment Manager</b> <i>Insights that drive financial value</i></p>

# Tasks Generally Performed by Wealth Management Teams



- Performance reporting
- Attribution analysis
- Risk analytics and reporting
- Compliance reporting



- Fundamental research/analysis
- Manager evaluation
- Sector/thematic research
- Investment meeting preparation



- Asset allocation modeling
- Rebalancing analysis
- Tax optimization
- Cash flow management

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## *Solution Demonstration*



# Key Questions for Every Boardroom

## Are We Ready?

01

What's our enterprise-wide AI strategy?

Where are the biggest opportunities for impact with conversational AI?

02

Do we have the skills & culture to scale AI?

03

How are we measuring ROI and results?

04

*Face the Future with Confidence*<sup>®</sup>

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