



For L&D leaders in financial services

EPISODE 3 /// RECAP

Leading Through AI: Trust, Talent & the Future of FS

Broadridge President Chris Perry on reinvention, building an AI-ready culture, and the enduring power of human judgment.



Chris Perry

President, Broadridge Financial Solutions



Sarah Clarke

CEO, Intuition Americas

ABOUT THIS EPISODE

Meet the Speakers

Recorded in the heart of Manhattan's financial district, this episode of The IKN Podcast brings together Broadridge President Chris Perry and host Sarah Clarke for a wide-ranging conversation on leadership, technology, and the future of work in financial services. Drawing on a four-decade career, Perry makes a clear case that artificial intelligence is not a threat to human talent but an amplifier of it, provided institutions invest in transparency, reinvention, and a culture that helps people control their own destiny. From Broadridge's CREATE values to its trusted and transformative approach to cybersecurity, the discussion offers a practical blueprint for L&D leaders navigating an era of unprecedented change.



Chris Perry
President,
Broadridge

Chris Perry

President, Broadridge Financial Solutions

Chris Perry is President of Broadridge Financial Solutions, where he leads global growth strategy, revenue, and international expansion. Across a four-decade career spanning banking, brokerage, and financial information systems, he has built a reputation for team-first, authentic leadership grounded in a simple ethos: help the people around you succeed, and success follows. Since joining Broadridge more than a decade ago, he has helped steer its evolution into global infrastructure that settles trillions in transactions daily, and is a vocal advocate for workforce reinvention, responsible AI adoption, and the enduring value of human judgment.



Sarah Clarke
CEO, Intuition
Americas

Sarah Clarke

CEO, Intuition Americas

Sarah Clarke is CEO of Intuition, Americas, and founder of the Intuition Knowledge Network, where she hosts The IKN Podcast. She joined Intuition more than 22 years ago in her native Dublin, and a background in digital design for interactive media brought her to New York in 2008 to help grow the U.S. market. Today she leads Intuition's knowledge management, digital and AI solutions, instructor, and consultancy services, and under her leadership Intuition Americas has become the firm's largest revenue-generating region. A graduate of Trinity College Dublin and MIT Sloan Executive Education, she is passionate about connecting talent, sharing knowledge, and solving business challenges through digital solutions.

VISUAL OVERVIEW

The Episode at a Glance

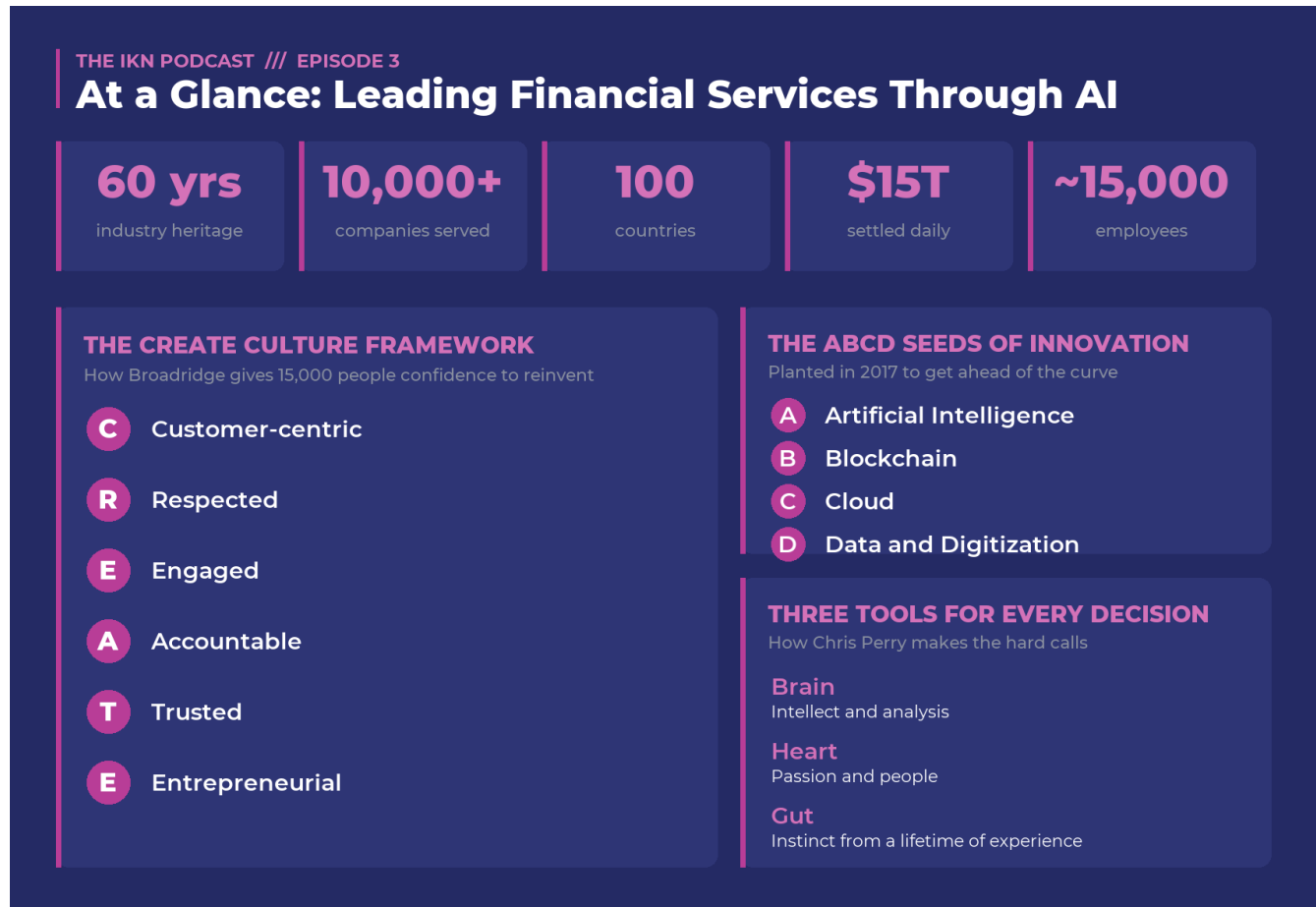


Figure 1: The frameworks behind Chris Perry's view of leadership and AI in financial services.

THE THROUGHLINE

Across leadership, culture, security, and sales, one thread holds: AI raises the value of human judgment, and the institutions that train for it will lead.

KEY THEMES

What We Explored in This Episode

Across the conversation, five themes stood out, each with direct implications for how financial institutions train and develop their people.

THEME	KEY INSIGHT	WHY IT MATTERS
AI as Amplifier	Perry frames AI as an always-on expert that makes anyone instantly smarter, but only if you query and verify it rather than blindly trust its output.	L&D must teach critical, skeptical AI use, not just access. Judgment is the differentiator.
The CREATE Culture	Broadridge's CREATE values (Customer-centric, Respected, Engaged, Accountable, Trusted, Entrepreneurial) give 15,000 employees a shared language for navigating uncertainty.	A values framework gives people the confidence to reinvent rather than resist.
Reinvention Over Fear	Every associate carries an AI objective, and offshore teams are being retrained as automation absorbs routine work. Transparency beats fear.	Proactive retraining is an employer obligation that protects both talent and trust.
Trusted & Transformative	On cybersecurity, being compromised is infinitely expensive. Broadridge builds immutable, repaved systems that recover in seconds and treats the CISO as critically as the CFO.	Resilience must be designed in, not bolted on. Security is now a board-level capability.
The Human Edge	Communication, intellectual curiosity, and gut instinct still close deals and solve problems. AI supports the salesperson; it does not replace the human in the loop.	Curiosity, EQ, and judgment are the durable, teachable advantage.

CONVERSATION HIGHLIGHTS

Moments That Matter



If you help the people around you be successful, you'll be successful.

Chris Perry, President, Broadridge Financial Solutions



People don't generally get fired for status quo. They also don't get promoted for status quo.

Chris Perry, President, Broadridge Financial Solutions



Human intelligence is not dead. It's in fact even stronger, because it has tools now that can make it smarter.

Chris Perry, President, Broadridge Financial Solutions

FROM THE CONVERSATION

Additional Insights Worth Noting

- A difficult moment is one of the best times to launch to the next level. Broadridge doubled down through the 2008 to 2009 financial crisis.
- The ABCD seeds of innovation (AI, Blockchain, Cloud, Data) launched in 2017. Blockchain was aimed at a real problem, repos, not chased as tech looking for a use.
- Intellectual curiosity is the ultimate edge. AI now lets anyone ask any question without fear of judgment.
- Well-rounded sales talent rests on three legs: communication, client-business fluency, and technology plus fintech understanding, with communication the most important.
- Quantum computing is roughly 18 to 30 months out. Atomic, near-instant settlement and tokenized assets are the next frontier.

WATCH

Catch the full conversation with Chris Perry on The IKN Podcast, now on our YouTube channel: youtube.com/@IntuitionKnowledgeNetwork

YOUR ACTION PLAN

What to Do After Listening

Turn the conversation into action. Four moves L&D leaders can make to put Chris Perry's thinking to work inside their own institutions.

01

Make AI a daily habit, not a tool

Give every team member an AI objective, as Broadridge did with company-wide AI KPIs. Familiarity comes from daily use, not policy memos. Pair access with training on how to query and verify what the model returns.

02

Build a values language for change

Adopt or sharpen a simple culture framework, the way Broadridge uses CREATE, so people have a shared, confidence-building vocabulary for navigating uncertainty rather than fearing it.

03

Reinvest in reinvention

Map which roles automation will reshape, then fund retraining and redeployment paths before the disruption lands. Treat workforce reinvention as an obligation, not an afterthought.

04

Treat resilience as strategy

Brief your people on the trusted and transformative balance: security that protects without smothering innovation. Make cyber-awareness and rapid recovery part of everyone's job, not just the CISO's.



The competitive advantage belongs to those who act now. Lead the transformation of your institution's intellectual capital.

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The Conversation Continues

The IKN Podcast is produced by Intuition Knowledge Network, the trusted partner for 300+ financial institutions training over 2.5 million professionals globally. Each episode brings together practitioners, strategists, and innovators to explore what it means to build the next generation of financial services learning.

Intuition's 40-year legacy of pedagogical excellence meets the frontier of AI, simulation, and human-centric design, ensuring every episode delivers insights you can act on immediately.

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