

FIN CX 2021 PROGRAMME

PROGRAMME

08.30 **Registration, Informal Networking & GIC Opening Remarks**

09.10 **Morning Co-Chairs' Opening Remarks**

Chair icon

Becky Franks

Head of UX & Optimisation

The Co-operative Bank plc

Donata Peksa

Head of Brand Experience

HSBC

FINTECH & DISRUPTOR INSIGHTS – PANEL

09.25 **The Latest Insights & Expertise From FinTech, Disruptors & Challengers Into The Innovations Reshaping CX Post-Pandemic**

- COVID-19 has disrupted customer experience hugely, but what new disruptions could we face in the 'new normal'; and how can your organisation future-proof against them?
- What key tech advancements are emerging on the horizon to overhaul how customers experience your business?
- How can institutions hampered by legacy systems build agile strategies into their customer experiences?

Corinna Lamberti

VP of Product

Chip

Alessandro Onano

Chief Marketing Officer

Moneyfarm

Sarah Ratner

Chief Operating Officer

Lendable

10.00 **Agent Wellbeing and Mental Health**

Join Sabio as we explore the #1 megatrend in the customer experience industry that nobody is talking about.

The role of the agent has changed forever. The exponential growth and explosion of automation and self-service technology is helping organisations reach their market in the way their customers want to engage. But what impact is this having on our agents? Without the simple, repetitive tasks that are now handled by self-service applications, agents are dealing with more complex, emotional and

urgent interactions than ever before – the average handling time of these interactions are increasing too. Combine this with remote working initiatives imposed by the global pandemic which may be making our agents feel isolated, we have created the perfect storm. A storm where mental health issues are on the rise.

James Hughes
Group Head of Solutions
Sabio

10.20 Morning Refreshment Break With Informal Networking

10:50 **How TSB Democratised Research On Their Journey To Customer Centricity**

In this fireside chat, learn how TSB successfully enabled Designers and non-researchers to run their own UX research, the challenges they faced and how they overcame them.

Lee Duddell
UX Director
UserZoom

Alexander Muir
Lead CX Researcher
TSB Bank

MAINTAIN THE HUMAN TOUCH

11.05 **Ensure The Human Element Remains Central To Your CX Strategy When Implementing New Tech To Create Streamlined Customer Journeys Across Multiple Touchpoints**

- How can we ensure that tech solutions and the human touch work hand-in-hand to provide effortless journeys for customers?
- Proactively identify and prioritise the areas customers need human interaction in their journey to serve vulnerable customers and more serious customer situations
- Effective strategies to harness AI to remove pain points from customer journeys, whilst still having that human contact close by when things go wrong

Chris Tobias
Head of Design
Nutmeg Saving and Investment

11.30 **The Next Generation Of CX: Creating New Dimensions Of Customer Engagement & Revenue Using Behavioural Science**

- Effectively boosting CX with a human-centric approach
- Achieving a deeper customer engagement that influences customer behaviour and builds financial wellbeing
- Turning engagement into additional revenue streams

Stina Söderqvist, PhD

Science Manager
Dreams

CUSTOMER BEHAVIOURS & EXPECTATIONS

Double Perspective

11.45 Tap Into The Latest Changes In Customer Needs & Expectations To Consistently Provide Gold-Standard Customer Experiences

- Where do customer priorities lie post-pandemic and how can you shift gears to meet their ever-changing needs?
- With other industries still leading the way in CX, what can be done to keep pace and ensure financial services are exceeding customers' rising expectations?
- The pandemic has naturally shifted customers behaviours towards digital experiences and self-serve, but how can financial services help embed these behaviours in the long-term?

11.45 Lisa Scott
CMO
Banked

12.10 Brian Stewart
Global Head of Customer Insight, Digital Experience & Analytics
AXA Investment Managers

DEVELOP CUSTOMER-CENTRIC CULTURES – PANEL – ONLY THERE FOR CLOSING REMARKS WITH DONATA

12.35 Ensure CX Is A Top Priority Throughout Your Organisation & Create A Culture That Places The Customer At The Heart Of Every Decision

- Secure buy-in from teams all across the business and make customer-centricity a core component on the agenda of every team
- Inspire a culture where employees go above and beyond for customers, creating those brand-boosting moments customers wont forget
- How can employee-focused programmes feed into your CX strategy and filter back into improved experiences for customers?

Ashley Flight
Head of Digital Engagement
HSBC

Nicki Osborne
Senior Customer Experience Manager (Customer Vulnerability Programme Lead)
M&G plc

Ben Williams
Head of Digital Web
The Co-operative Bank plc

Max Clarke
Chief Marketing Officer

Schroders Personal Wealth

Kate Reeve
Head of Customer Insight
RBS International

Philippe De Brossard
Global Head of Client Experience & Steering
Société Générale

13.10 Lunch For Delegates, Speakers & Partners

13.20 Peer-To-Peer Discussions

A. Customer Expectations Post-FCA

Darren Black
Head of Protection & Insurance
Nationwide Building Society

14.10 **Afternoon Co-Chairs' Opening Remarks**

Chiara Brocchi
Head of Customer Experience & Satisfaction Excellence
AXA Italia

Bhavik Mohandas
Director of Product Management
American Express

14.25 **How Uniting A Business Around Customer Experience Delivers Exponential Gains**

Customers are hard won and easily lost in digital, but delivering the best digital customer experience when organisations can be siloed or when different teams have conflicting objectives is not always obvious or easy. Join Peter as he shares Paragon DCX's research from over 200 CX professionals and real world examples for tackling customer experience challenges within the Financial Services sector, no matter how big or small, with a proven methodology to help businesses deliver joined up digital customer experiences that count.

Peter Paterson
Managing Director
Paragon DCX

14:40 **Client Centricity – Case Study**

Philippe De Brossard
Global Head of Client Experience & Steering
Société Générale

Customer Journeys

15.05 **Remove Pain Points & Create Seamless Journeys Across Multiple Channels To Drive Customer Experience & Conversion**

- How can we ensure the dots are joined up across multiple channels to ensure customer's experiences are streamlined and simplified?
- Utilise the latest techniques in customer journey mapping to smooth customer experiences across multiple channels
- With so many possibilities across virtual customer experience, discern the platforms and channels that best fit the needs of your customer base

Craig Goold
Head of Customer Experience & Change Demand & Chairman at Skipton Business Finance
Skipton Building Society

15.30 Afternoon Refreshment Break With Informal Networking

MEASUREMENT & ROI

16.00 **Harness The Latest Measurement Techniques To Prove The True Value Of Your Customer Strategies & Win Long-Term Executive Buy-In**

- Beyond NPS: explore key metrics to evaluate success at every stage of the customer journey
- Maximise efficiencies in your measurement processes and ensure you have all your data working together to drive actionable insights
- Translate your efforts effectively and showcase the fruits of your labour to prove success and secure long-term financial backing and board buy-in

Avi Ashkenazi
Head of Customer Products
Iwoca

THE DEVELOPER EXPERIENCE IN FINANCIAL SERVICES

16.25 **In Today's Age, Financial Services Companies Are Having To Transform Into Tech Companies. Developers Are The New Rock Stars Of Banking. But What Does This Mean For Your Business?**

- How can you keep up with this trend?
- How are developers needs different from other financial services roles?
- How can you leverage user research to improve the developer experience?

Lisa Fraser
Executive Director (VP) UX Research
Goldman Sachs

1#6.50 Afternoon Co-Chairs' Closing Remarks & Competition Announcement