

Registration, Informal Networking & GIC Welcome

08:30 - 09:15

Morning Chair's Opening Remarks

09:15 - 09:25

Rachel Whitaker
Head of Savings & Investments

Formerly Aviva

Customer Journeys - Double Perspective

09:25 – 10:05

Resolve Disjointed Customer Journeys With Customer-Led Service Design & Deliver Cohesive Omni-Channel Customer Experiences

- Test, test, test – where are customers consistently experiencing pain points? How can we eliminate them to ensure a consistent, frictionless customer experience?
- How can we approach the user experience holistically and leverage existing methodologies to improve design and UX? It's not just the tech! Are your teams combatting organisational silos to communicate?
- Achieve true omni-channel with consistent brand messaging and feel and joined-up customer servicing to reassure and retain customers whether in-branch or in-app.

09:25 Perspective One

Marco Rodrigues
Deputy Head of CX & Design
BNP Paribas Securities Services

09:45 Perspective Two

Jessica Harris
Senior Best Practice & Programmes Manager (Customer Success)
GoCardless

Changing Customer Behaviours & Expectations - Q&A Panel

10:05- 10:35

Seize Valuable Insights Into Evolving Customer Needs & Expectations To Deliver Exceptional Experiences That Future-Proof Strategies & Adjust To Change

- Pandemic-related disruption has weighed heavily on financial services customer behaviours... what customer expectations and needs have become the new norm and how can business models be adapted appropriately?
- Enhance efficiencies, improve decision making and reduce costs by creating deeper relationships with customers through understanding and meeting their needs.
- Build authoritative models on customer behaviour that respond to the rising customer demands for increased immediacy, seamless and paperless experiences to sustain a competitive advantage and stay relevant in the market.

Simone Vincent

Head of Email Marketing

Fidelity International

Kelly Hamid

Head of Regulatory Product Compliance

Monzo Bank

John Sills

Managing Partner

The Foundation

Building A Compassionate Culture: The Science Behind Vulnerable Customers

10:35 - 10:50

Perspectives & A Strategy Playbook For Digital Therapeutics

- Learn how nudge theory can be used to support vulnerable customers

- Understand the Behavioural Science behind vulnerability and what this means for business
- See how an innovative training course has transformed the customer experience for vulnerable customers

Ziba Goddard
Chief Consulting Officer
Cowry Consultancy

Raphy March
Chief Design Officer
Cowry Consultancy

Morning Break With Informal Networking

10:50 - 11:20

Digital & Business Transformation In Financial Services

11:20 - 11:40

Digital & Business Transformation Strategies To Shape The Future Of Customer Experience In Financial Services

- As the world moves rapidly towards technology-enabled future, how can financial services providers optimise CX using their increased digital capabilities with innovative digital tools that are designed and centred on the customer?
- Enable the business to break free from the conservative boundaries of legacy technology and systems and embrace new ways of thinking and strengthen relationships with customers
- How have hybrid ways of working transformed business models and the need for a multi channel strategies in CX?
- Agility has become a crucial factor for market success: how can this skill be harnessed to achieve wins for customers and to align business and customer values?

Eloise Taysom
Head of Product
Bud

Smart Communications Case Study

11:40 – 11:55

Delivering Empathy At Scale: How Financial Services Brands Are Re-Imagining Digital- First Customer Conversations

It is more essential than ever that Financial Organisations focus on making customer interactions as personalised and frictionless as possible across every engagement channel – from the web and in-app messaging to the contact centre and face-to-face. In this presentation, we will discuss and share industry insights on how organisations can communicate empathy when two-way interactions are taking place in the digital world instead of human to human.

Karen Oakland

VP, Vertical Marketing

Smart Communications

Tech Innovation- Double Perspective

11:55 – 12:15

Leverage Cutting-Edge Tech Solutions To Create A More Dynamic & Impactful Customer Experience That Delivers Efficiency Through Innovation

- Conditions and parameters to select the right tech for your business, your customers and their journeys and achieve effective integration of technology into customer experience
- Constraint or possibility: what are the opportunities and challenges associated with different emerging technologies and how they add value to the customer experience?
- From advances in automation, AI and machine learning, chatbots and voice-to-text software, what's next for financial services to respond to customer needs and help optimise the customer journey?

11.55 Perspective One

Grace Hayes

Senior Vice President Customer Delivery Europe

Mastercard

We've Made A Bet: Experience Will Be Your Brand

12:15 – 12:30

Gareth will talk you through the must-haves to add to your digital experience agenda in 2022.

1. Privacy: The Elephant in the Room
2. Getting Data into Everyone's Hands
3. Why speed is king and how to accelerate your optimisation programme

Gareth Drabble

Director of Customer Success

Contentsquare

Tech Innovation- Double Perspective

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12.30 Perspective Two

Ashok Kumar

Sr. QA Engineer

Tide Platform Limited

Lunch Break & Informal Networking

12:50 – 13:50

Afternoon Co-Chairs' Opening Remarks

13:50 – 14:00

Stuart Miller
Chief Customer Officer

Newcastle Building Society

Peter Frost
Chief Customer Officer

Coventry Building Society

Verint Case Study

14:00 – 14:15

Navigating The Cost of Living Squeeze: How to spot and respond to struggling customers, escalating trends, and competitive threats

It's never been tougher. As the cost of living spikes, in an already fragile post-pandemic world, customers and businesses alike are reassessing finances and looking at how to achieve best value. This is driving unprecedented interactions: from requests to switch to cheaper bank accounts and insurance policies to a readiness to complain, seek recompense or churn to new providers - combined with a surge in newly vulnerable customers.

- Join this crucial, timely session and discover how to
- Unlock real-time vital intelligence from your customers – and respond rapidly and strategically
- Pinpoint vulnerable customers and those at increased risk following sustained cost of living hikes
- Understand the competitive landscape and the new products and tactics that must be implemented in this new world

Alistair Mearns
Director, Solutions Consulting

Verint

Measurement & ROI - Critical Insights

14:15 – 14:35

Measure, Improve, Succeed! Set KPIs To Assess Performance & Refine CX Strategies With Customer-Led Data To Increase Customer Satisfaction, Retention & ROI

- Beyond NPS, what benchmarks are most beneficial for assessing performance and how can the results of these be translated effectively into improved customer experiences?
- Ensure effective measurement KPIs and benchmarks in order to truly evaluate success and determine strategy ROI
- Utilise key insights from customer feedback, reviews, satisfaction rates to develop innovative strategies that secure and improve customer retention and sustain customer engagement

Micheal Sherwood
Head of Digital Experience

Atom Bank

Bonus Session; Nomensa

14:35 – 14:55

Chris Richard
Creative Director

Nomensa

Jan De Schepper
Chief Sales and Marketing Officer

Swissquote Bank SA

Customer-Centric Cultures - Panel Q&A

14:55 – 15:25

Build Game-Changing Customer Experiences By Developing Progressive Cultures That Are Committed To Going Above-&-Beyond For The Customer

- In 2022, how can financial services organisations be driven by the customer rather than business requirements that are not fully validated by the end user?
- Empower customer-facing employees with the right tools, technology and agency to deliver good customer outcomes
- How can you set customer experience as a benchmark of success for the wider business and instil a company culture that is committed and incentivised to do better for the customer?

Andy Russell
CEO

Wealthify

Mitchell Barker
Head of Product & Chief Distribution Officer

HSBC Life (UK) Ltd

Steve Bodley
Head of Digital Marketing Delivery

Hargreaves Lansdown

Emma Krygier
Head of Department Supervision Hub

Financial Conduct Authority

How Redis Enterprise Enables Real Time Customer Experience & Drives Digital Adoption

15:25 – 15:40

The speed of the digital economy has fundamentally transformed the expectations of today's consumers. Financial services firms are undergoing massive digital disruption and are modernising their applications to provide superior customer experience, better decision-making, and improved resilience. Thus, they need real-time responses to fight digital disruptors, bring new services to market, and deepen customer relationships. They need to transform their approach for software architecture to deliver instant

personalisation, fraud detection, transaction scoring, investment decisions, and more. Join Redis at the Financial Customer Experience conference where we'll discuss how Redis Enterprise provides the modern data models required to successfully deliver real-time financial services, while enabling organisations to remain secure and compliant.

Peter Simpson
Strategic Account Director- Financial Services

Redis

Afternoon Break With Informal Networking

15:40 – 16:10

Bonus Session; Palantir Technologies

16:10 – 16:25

With so much historical data at their disposal, banks have the raw materials to build a deeper understanding of what their customers want, what they need, and how to best deliver this. The right technological solution will bridge the divide between data and customer value, by:

- bringing operations closer to analytics through a semantic representation of customers and the context of their actions
- using dynamic feedback loops to recursively improve the bank-customer relationship
- deploying machine-learning at scale across all client interactions

We share our experience in helping some of the world's leading organisations and financial institutions deliver more personalised, relevant, and seamless customer interactions.

Andy Lee
Business Development Lead

Palantir Technologies

Human-Driven Financial Services - Panel Q&A

16:25 – 16:55

From Financial Literacy To Digitally-Challenged Customers: How Can Financial Services Move Beyond A "One Size Fits All" Approach To Ensure That Every Customer Has Access To The Support They Need?

- With the rise of fraud and scams during the pandemic and the boom of “buy now, pay later,” how can financial services institutions step up to educate customers financially and build trust in their services and security
- What can be done to reverse the failure to look after and reward long serving customers and instead incentivise their loyalty?
- When we’re designing channels and strategies around the many, how do we ensure we can still cater to the few who need additional support and a wider channel range? And how do we get C-Suite on board?

Anuradha Deshpande
Director of Global Customer Support

GoCardless

Vadim Toader
CEO

Proportunity

Joseph Fry
Automation Analyst

Handelsbanken

Afternoon Co-Chairs’ Closing Remarks & Close Of Conference

16:55 – 17:05

Stuart Miller
Chief Customer Officer

Newcastle Building Society

Peter Frost
Chief Customer Officer

Coventry Building Society