

Registration, Informal Networking & GIC Welcome

08:30 - 09:15

Morning Chair's Opening Remarks

09:15 - 09:25

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.

Tom Girling, Head of Regulated Advice, Skipton Building Society

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

11:45 – 12:05

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 – 12:35

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

12.15 Perspective Two

Kumar Ashok, Sr. QA Engineer, Tide Platform Limited

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

12:35 – 12:50

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

Measurement & ROI- Critical Insights

12:50 – 13:10

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

Verint Case Study

13:10 – 13:25

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

Lunch Break & Informal Networking

13:25 – 14:25

Afternoon Chairs' Opening Remarks

14:25 - 14:35

Rachel Whitaker, Head of Savings & Investments, Formerly Aviva

Peter Frost, Chief Customer Officer, Coventry Building Society

Customer-Centric Cultures- Panel Q&A

14:35 – 15:05

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

Matthew Whetton, Chief Technology Officer, Oakbrook Finance

Sathish Jain, Executive Director - User Experience, J.P. Morgan

Steve Bodley, Head of Digital Marketing Delivery, Hargreaves Lansdown

Mitchell Barker, Head of Product & Chief Distribution Officer, HSBC Life (UK) Ltd

Emma Krygier, Head of Department Supervision Hub, Financial Conduct Authority

Bonus Session; Nomensa

15:05 – 15:25

Chris Richard, Creative Director, Nomensa

Jan De Schepper, Chief Sales and Marketing Officer, Swissquote Bank SA

Digital Vs. Human Touch

15:25 – 15:45

Maintain The Balance Between Human Touchpoints & Digital Technologies To Reflect Customer Needs

- How can we bridge the substantial divide between the demand for in-person interaction versus digital channels to create an overall seamless and hybrid experience that caters to everyone's expectations and needs?
- Understand how your customers interact with your products and organisation to discern where different channels and touchpoints provide the best experience and support
- With digital payments becoming a mainstream habit, how do you reassure, safeguard and provide for customers who are reluctant to switch to new payment products and methods of banking?
- More than automation: strategically divert digital journeys towards real-time human interaction to address complex, sensitive queries more appropriately and successfully

Anne-Marie McConnon, Chief Marketing & Client Experience Officer, BNY Mellon Investment Management

Bonus Session; Redis

15:45 – 16:00

Peter Simpson, Strategic Account Director - Financial Services, Redis

Afternoon Break With Informal Networking

16:00 – 16:30

Data-Driven CX Strategies

16:30 – 16:50

Harness The Latest Data Insights To Create In-Depth, Tailored, Customer Centric Strategies That Enhance The Customer Experience

- Leverage customer data for a more detailed understanding of customer values and expectations to provide sophisticated, data driven experiences which improve the customer journey

- Implement a human-centred customer experience design which prioritises relevant, personalised products based on past interactions and anticipated future actions to ensure continuous customer engagement
- Moving towards a cookie-less world means customer data is more valuable than ever- how can that data be collected, managed and optimised to deliver a more accurate, personalised experience that emphasises the customer voice?
- Unlock potential value by making data and insights work harder to meet customers' demands that focus on matching personal values to drive tangible results

Rhona Cameron, Global Head of Brand & CX, BNY Mellon Investment Management

Bonus Session; Palantir Technologies

16:50 – 17:05

Andy Lee, Business Development Lead, Palantir Technologies

Human-Driven Financial Services- Panel Q&A

17:05 – 17:35

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?

Anna Roughley, Head of Insight, Lending Standards Board

Anuradha Deshpande, Head of Product Support, GoCardless

Vadim Toader, CEO, Proportunity

Afternoon Chairs' Closing Remarks & Close Of Conference

17:35 – 17:45

Rachel Whitaker, Head of Savings & Investments, Formerly Aviva

Peter Frost, Chief Customer Officer, Coventry Building Society