

The Omnichannel Excellence In Financial Services Conference

18<sup>th</sup> January 2023

1 America Square, 17 Crosswall, London EC3N 2LB



# Omnichannel Excellence In Financial Services Conference

## Official Programme

Please note that these timings are flexible. Due to the nature of a live event, the conference chairs and organisers will be updating the timings throughout the day to adapt to speakers running over time, late arrivals, last minute changes and extending popular sessions. Please rest assured we will do our utmost to adapt and to accommodate all live changes.

### Registration, Informal Networking & GIC Opening Remarks

08.30 – 09.30

### Morning Chair's Opening Remarks

09.00 – 09.10

Jazz Singh, Deputy Global Head of Communications, **Société Générale**



### Winning Channel Strategies

09.10 – 09.30

#### **Drive Consistency Across New & Existing Channels Alike & Consolidate Splintering Customer Bases With A Blended Offering & User-Friendly Experience**

- Harness an inter-connected channel strategy across web, mobile, app and online banking platforms for customers to enjoy a true omnichannel experience
- Smooth out pain points and design frictionless journeys on mobile in-app content and elsewhere so that customer needs are met comfortably in the same platform
- Enhance your data mining for close insights on expectations and achieve personalised pathways that facilitate customers' needs at each step of their journey
- Integrate valuable content within your web interface, where embedded videos, podcasts and more create excitement, buzz and give customers shareable content to bolster confidence in your brand and boost platform interactivity
- Behind the scenes: bring your teams together around one table to work as squads with an agility that promotes small-scale incremental progress and large-scale changes at pace

Heather Hearne-Pool, Digital Experience Lead, **RBS International**



**Digital Transformation - Panel & Q&A**

09.30 – 10.10

**Achieve Painless Digital Transformation To Update Channel Strategies In Line With Ongoing Shifts Towards Digital & Successfully Increase Customer New Tech Adoption**

- Find a balance between the best new tech approaches and old-school channel expertise to appeal to a varied customer base during digital transition
- Ensure the importance of back-office customer centricity is realised to design effective self-servicing options and best-in-class omnichannel performance
- How can you achieve high-quality, user-friendly digital services which deliver a competitive edge – especially in Financial Services spaces where traditional business and channels are still highly prized?
- Driven by strategy first: enhance your automation and AI and track and measure return on investment to prioritise digital channel design that is tailored to your value proposition

Kassie Siwo-Gasa, Head of Digital Marketing, **Legal & General Investment Management (LGIM)**



Stewart Conway, Head of Digital & Sales Enablement, **Columbia Threadneedle Investments (EMEA & APAC)**



Anand Doshi, Head of Digital Advisor & Client Solutions, International Private Bank, **JPMorgan Chase & Co**



Alexandra Dodds, Director of Product Management, Global Mobile App, **American Express**



**Fintech & FS Horizon Scanning - Double Perspective**

10.10 – 10.50

**With The Rapid Growth In FinTech... Remodel Your Consumer-Facing Products To Be User-Friendly, Customer-Centric & Future Ready**

- Best-in-class customer service: advance your IVR, chatbots and other AI tools with slick design to take the weight off customer onboarding, resolution and more, and enable your company to prioritise the personal touch where it is most needed
- Get with the curve on contactless and wearables to meet rapidly changing habits around purchasing and in store experience
- Look to the future of open banking, point-of-purchase incentives, price comparison, buy-now-pay-later, data sharing and more
- Coming together in new battlegrounds: understand where the risks and opportunities lie in blockchain and cryptocurrency to chart your trajectory within the finance of the future

10.10 – 10.30

Ange Johnson de Wet, Cloud Enabled Business Transformation – Head of Function, **Lloyds Banking Group**



10.30 – 10.50

Anuj Agarwal, Data And Analytics Lead, **Natwest Group**



**Morning Refreshment Break With Informal Networking**

10.50 – 11.20

**Bonus Session Reserved For Exclusive Conference Partner, Epsilon**

11.20 – 11.35

**Strategic Imperatives Our Brands Can Learn From Large Consumer Tech Platforms**

Epsilon looks at some of the key ingredients that are needed to remain competitive in an increasingly platformed world and how financial brands are doubling down on all party data strategies and activations

Maria Giacobbe, Senior Vice President, Business Development, **Epsilon**



**Customer Generation: Acquiring & Retaining Your Best Customers**

11.35 – 11.55

**Identify The Best Channels To Reach & Engage New Customer Groups, Boost Efficiency In Your Customer Acquisition & Retain Loyal Customers**

- Savvy clientele: with more and more individuals sourcing their financial services independently, court new customers with clear, relevant and competitive products
- Ride the wave of new tech to maximise your offerings across all available channels, glean valuable data and deliver new customer pipelines for your company
- With sector trailblazers and FinTechs constantly innovating their channel choices to match their customer bases, how can you adapt your approach to win and retain market share?
- Capitalise on inbound marketing, client referrals and more to reduce costs, tap into new customer behaviours and inspire them to create the buzz for you
- In a crowded marketplace, how can we growth hack in new channels and customer bases to improve cross- and up-selling and drive additional revenue growth

Mike Davies, Head Of Business Development, **Yorkshire Building Society**



**Growth Markets & Younger Digital Natives**

**Redesign Channels To Optimise Self-Service & Drive Investment In The Tech-Savvy, Mobile-First Generation To Secure Long-Term Market Share**

11.55 – 12.15

- With finance institutions and FinTech challengers going hard for growth in the new age of online banking, reach and retain mobile savvy audiences with slick banking and investment portals
- In challenging economic times, appeal to younger generations who are socially responsible and proactive in managing their finances with attractive product offers and sustainable investment opportunities
- Tailor products to new customer habits and unlock personalisation and transparency with slick account self-management tools and relevant upselling
- Know the value of younger customers and their data and embed loyalty into your offerings to reap the long-term benefits

Nikunj Lukka, Head of Operations, **Octopus Wealth**



**Bonus Session Reserved For Exclusive Conference Partner, Finastra**

12.15 – 12.30

**From FinTechs To Crypto & Tech To AI & Open Banking... How Future Proofed Are You?**

Margaret Franco, Chief Marketing Officer, **Finastra**



**FINASTRA**

### Open Banking – Case Study

12.30 – 12.50

#### **How Is Consumer Data Evolving At Point-Of-Purchase & Driving Market Opportunities Around Choice & Personalisation?**

Bruno Nicole, Global Open Banking Program Manager, **BNP Paribas Personal Finance**



### Lunch For Delegates, Speakers & Partners

12.50 – 13.50

### Informal Peer-To-Peer Discussions

13.20 – 13.45

#### **a) Venture Capital**

Alessandra Canavesi, Head Of Digital Marketing & Customer experience, **AXA Investment Managers**



#### **b) Vulnerable Customers**

Louise Allemagne, Compliance Manager, **The Lending Standards Board**



**Afternoon Chair's Opening Remarks**

13.50 – 14.00

Charlie Adams, Customer Service Operations Manager, **Vitality**



**Customer Cultures & Interdepartmental Collaboration - Panel & Q&A**

14.00 – 14.30

**Talking The Same Language? Step Up Your Customer-Centric Cultures To Achieve Internal Cross-Functional Collaboration & Tangibly Improve The Front-End Omnichannel Customer Journey, Maintain High Levels Of Service & Thrive In A Competitive Marketplace**

- Bring the customer to life beyond the data or personalisation for your back-end teams to create truly customer-first cultures
- Uncover how marketing, sales, growth and relationship management functions sit best within your company and support each other to fuel and consolidate your customer base
- Tech revolution? How can we support colleagues in the shift towards digital skillsets, be clear in our strategy, aims and direction, and help them flourish in driving effective channels?

Alessandra Canavesi, Head Of Digital Marketing & Customer experience, **AXA Investment Managers**



Wasim Mushtaq, Transformation Lead Financial Markets, **Standard Chartered Bank**





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Maninder Bahra, Former Managing Director, Chief Control Officer, **Barclays UK**



Daniele Calderoni, Group Head of Brand Marketing, **Zurich Insurance Company Ltd**



Lucile Flamand, Chief Strategic Development Officer, **Bibby Financial Services**



### InvestSmart Campaign – Case Study

14.30 – 14.50

#### **Help Consumers Make Better-informed Investment Decisions & Become Smarter Investors**

Emma Stranack, Head of Department, Communication Strategy, Content & Channels, **Financial Conduct Authority**



### Compliant Customer Strategies For 2023

14.50 – 15.10

#### **With National Regulators & Silicon Valley Playing Catch-Up On Customer Strategies & New Tech, Monitor Compliance Closely To Protect Customers, Insulate Your Company From Key Risks, Remain Agile & Act Quickly On Channel Opportunities**

- What is the latest guidance? And how can we best collaborate with our risk and compliance teams to drive innovation in risk-averse environments?

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- End-to-end, responsive and secure: pave the way for your customers' digital journeys with security checks, smooth hand-offs to live agent support and built-in service excellence
- Allay concerns over fraud and privacy with clarity and transparency around anonymity, data protection and use, inspire confidence with timely and unobtrusive data requests, and reassure customers with a 360-degree view
- Internal processes and policies: strengthen clarity and knowledge-sharing between product, sales and marketing functions and compliance to boost efficiency when updating legacy systems to newer channels
- Make the necessary cultural shift on consumer protections to safeguard your customer outcomes at each stage of product service and development

Ross Cameron, Head of Regulatory Developments, **NatWest Group**



**Afternoon Refreshment Break With Informal Networking**

15.10 – 15.40

**Case Study: Insurance – Digital Underwriting & Value-Added Benefits**

15.40 – 16.00

**How Can We Translate Complex, Technical Products To Digital Channels, Still Offer A Great Service & Benefit From Customers Moving Increasingly Online?**

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



Tim Norman, Senior Product & Team Manager, **HSBC Life (UK) Ltd**



### **Traditional Channels In A Digital World - Smart Evolution**

16.00 – 16.20

#### **Don't Lose The Value Of Telephony, Letters, Emails, The Branch Network & In-Person Assistance In The Shift To Digital & Carry The Human Touch Forward**

- How can you secure the buy-in to retain investment in more traditional channels which service older, vulnerable and relationship-driven customer bases – and ensure the digital channel strategy remains aligned
- In the move away from phone contact and in-branch services towards digitalisation, listen and respond to vulnerable customers during the transition to ensure good client outcomes
- Support late adopters with video, visual aids and other means to increase the accessibility, comfort levels and adoption of new channels
- Don't underestimate opportunities within face-to-face and local relationships in servicing and converting high-net-worth individuals

Anna Roughley, Head of Insight, **The Lending Standards Board**



### **RETENTION & RE-ENGAGEMENT: CHANGING EXPECTATIONS – PANEL & Q&A**

16.20 – 16.50

#### **With Channels & Behaviours In Flux, Reinforce Your Customer Base With Great User Experience & Targeted Offers To Stay Competitive With Increasingly Knowledgeable & Less Loyal Audiences**

- Do customers really expect ASOS or John Lewis servicing from all FS institutions? How can we funnel efforts to strategically upgrade cross-channel UX where it matters most?
- Which key customer insights are most effective in unlocking compelling loyalty strategies? And how can we best take advantage of different approaches such as demand capture?
- Build a personal touch and a strong brand identity into your customer communications and marketing collateral for a slick UX to strengthen historical connection, develop emotional ties and create life-long customers

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Richard Smith, Head of Marketing Data, Analytics & Automation, **abr dn**



Kshitija Joshi, Vice President (Data Science), Global Data Office, **Nomura International**



**Afternoon Chair's Closing Remarks & Official Close Of Conference**

16.50 – 17.00