

The Omnichannel Excellence In Financial Services Conference

18th January 2023

1 America Square, 17 Crosswall, London EC3N 2LB



Welcome to The Financial Services Omnichannel Excellence 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.

The Omnichannel Excellence In Financial Services Conference

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1 America Square, 17 Crosswall, London EC3N 2LB

Registration, Informal Networking & GIC Opening Remarks

08.30 – 09.00

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

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EUROPE]

MARKETING **BUILT ON PROOF** NOT PROMISES™

Epsilon connects brands with their customers in ways that drive repeatable, incremental & validatable business outcomes at scale.

UNLOCK THE VALUE OF YOUR DATA

Collect, manage, analyse, and activate your data at scale, so you have a solid foundation for applying your data and driving meaningful marketing outcomes.

PERSONALISE YOUR COMMUNICATIONS

Deliver timely, authentic, and engaging 1:1 messages customised to what your customers care about: communications that drive real conversations and real sales.

BUILD LOYALTY

Unlock the power of your data to understand every customer's unique preferences and purchases to deliver a personalised experience that builds loyalty, engagement and two-way value exchange.

DRIVE TANGIBLE BUSINESS RESULTS

Our measurement framework is purposefully designed around a continual relationship building process which grows with you and adapts to your changing needs. Set, track and deliver business objectives, tying back to strategic goals and KPI's - not misleading or vague marketing metrics.

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Walgreens

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 With 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

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

11.55 – 12.15

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

Bonus Session With 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

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, Former Transformation Lead Financial Markets
Standard Chartered Bank



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?
- 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

Traditional Channels In A Digital World - Smart Evolution

15.40 – 16.00

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

Anna will address strategies to support traditional customer bases with the following considerations:

- The evolution of traditional and digital banking products and services – maintaining value
- Training, empathy, lived experience and inclusion
- Prioritising and achieving good customer outcomes



Anna Roughley
Head of Insight
The Lending Standards Board

Retention & Re-Engagement: Changing Expectations – Panel & Q&A

16.00 – 16.30

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



Richard Smith

Head of Marketing Data, Analytics & Automation

abrdrn



Kshitija Joshi

Vice President (Data Science), Global Data Office

Nomura International

Afternoon Chair's Closing Remarks & Official Close Of Conference

16.30 – 16.40