

FINANCIAL SERVICES CUSTOMER EXPERIENCE

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13.06.2023
Behavioural Insights, Real Value

21

Financial Services Brands 1 Day

A One-Day, Industry-Led Conference & Networking Exhibition, London, 13th June 2023

10th Annual

Exceed Customer Expectations With High-Impact, Mission-Critical Tech, Behavioural Data & Cultural Innovations For Exceptional Customer Experience Strategies & Outstanding Outcome-Focused Journeys In Financial Services

Group Discounts Available
Book 4 For 3

Leverage Changing Customer Needs & Expectations, Optimise Seamless, Cohesive Customer Journeys, Capture Critical Data Insights & Measure Customer Outcomes, Embrace Cutting-Edge New Tech, AI & Digital Innovations Which Balance The Human Touch, Secure Buy-In & Inspire Employees To Further Customer Duty, Support Vulnerable Customers & Deliver Bottom-Line Results

- 1 Outstanding, Outcome-Focused Customer Journeys:** Deliver proactive, value-adding and seamless customer journeys which boost the bottom line
- 2 Changing Customer Needs, Behaviours & Expectations - Unlocking Insights:** Keep pace with changing demands to maintain customer satisfaction and execute a value-driven and competitive experience
- 3 Power Data Insights For Tailored, Customer-Centric CX Strategies!** Leverage customer data and behavioural insights across customer touchpoints to drive impressive bottom line results
- 4 Customer-Centric Cultures Which Inspire Employees:** Embed customer-centricity into the heart of your organisation and inspire employees to go above and beyond
- 5 Monetise Cutting-Edge Tech & AI Innovations:** Harness next-generation technologies and AI for market-leading customer experiences
- 6 Proactively Identify & Protect Vulnerable Customers:** Enhance your support strategies and further customer duty promises with a deep-dive into the evolution and increased number of vulnerable customers
- 7 Measure, Assess, Refine, Repeat – Drive ROI:** Review your CX performance with tangible metrics that benchmark success
- 8 Streamlined Digital Vs. Meaningful Human Interactions:** Balance streamlined, digital-first customer experiences without sacrificing the human touch
- 9 Secure The Strategic Role Of CX In Financial Services:** Demonstrate proven results and value and win long-term buy-in
- 10 Next-Gen FinTech, Challenger & Disruptor Insights!**

 Alessandra Canavesi Head of Digital Marketing & Customer Experience AXA	 Sharna Thomson Head of Customer Zurich Insurance	 Ange Johnson de Wet Business & Commercial Banking Lloyds Banking Group	 Fergus Murphy Group Customer Experience Officer Virgin Money UK	 Kevin Murphy Integration & Programme Lead, Youth & Families NatWest Group	 Dave Priestley Chief Product Officer Vitality
 Jakub Weber Director, Client Experience, Strategic Advisor BNY Mellon, Securities Services & Digital	 Bhavik Mohandas Director of Digital Products American Express	 Karen Coleman Director of Customer Operations Wesleyan Assurance	 Andreas Pantazopoulos Head of Client Insight Coutts	 Ross Coombs Product Manager JP Morgan Chase	 Mevs Chaudery CX Specialist - Corporate Sales & FX Citi
 Laurence Veale Head of Experience Design AIB Bank	 Louise Allemange Compliance Manager Lending Standards Board	 Jürgen Blumberg Head of ETF Product & Capital Markets Goldman Sachs	 Vicki Heslop Director of Customer Operations Covéa Insurance Plc	 Ashley Driver Global Head of Digital Adoption - Commercial Banking HSBC	 Anna Roughley Head of Insight & Engagement Lending Standards Board
 Tom Clay Head of Data Science Covéa Insurance Plc	 Sarah Murray Lead Behavioural Architect Cowry Consulting	 Zac Shander-Kelsey Proposition & Client Experience Manager BNY Mellon	<div style="border: 2px solid black; padding: 10px;"> <p>PLUS!</p> <p>NEW Thought Leadership!</p> <ul style="list-style-type: none"> • 10th Annual Must-Attend Industry Gathering Of Leaders In CX, Customer Journey, Product & Digital • Brand New Innovations & The Latest Insights Into Outcome-Focused CX In Financial Services • 2 Interactive Panels: <ul style="list-style-type: none"> o Customer-Centric Cultures o Changing Customer Behaviours & Expectations • New Brands, Content & Case Studies! <ul style="list-style-type: none"> o Vulnerable Customers & The Cost Of Living Crisis • FinTech & Disruptor Insights <p>Organised By: </p> </div>		

08.30 Registration, Informal Networking & GIC Welcome

09.10 **Morning Chair's Opening Remarks**

 Fergus Murphy
Group Customer Experience Officer
Virgin Money UK



OPENING REMARKS

OUTSTANDING CUSTOMER JOURNEYS

09.20 **Drive Positive Financial Outcomes Across Your Service Delivery To Meet Regulatory Pressures, Maximise Financial Wellbeing For Customers & Boost Loyalty**

- Pre-empt and personalise content across every customer touchpoint for efficient, end-to-end journeys which build and secure long-term trust and brand loyalty
- Tackling critical questions: what are you doing to prepare for incoming FCA consumer duty regulations? How do you define a 'good' outcome, and how do you measure customer outcomes for success?
- Align your business structure with your CX strategies - break down internal silos and reap the rewards with clear internal communications and a smooth service design

09.20 Kevin Murphy
Integration & Programme Lead, Youth & Families
NatWest Group



09.40 Laurence Veale
Head of Experience Design
AIB Bank



CHANGING CUSTOMER BEHAVIOURS & EXPECTATIONS

10.00 **Adapt To Shifting Customer Spending Behaviours & Truly Understand Ever-Increasing Customer Expectations To Deliver Competitive Services & Gold-Standard Experiences**


Q&A

- Global pandemic, geopolitical disruption, and now the cost-of-living crisis - how can you continue to meet and maintain customer expectations with the added strain of physical health, mental health, and skyrocketing prices?


- Make it personal, but not too personal! Utilise AI and behavioural data to assess what consumers mean by a 'personalised' financial services experience that isn't imposing or discriminative
- When consumers needs are so different, how can financial services focus on key trends without leaving the minority behind?

 Andreas Pantazopoulos
Head of Client Insight
Coutts




 Ashley Driver
Global Head of Digital Adoption - Commercial Banking
HSBC

HSBC

 Louise Allemange
Compliance Manager
Lending Standards Board



10.30 **Bonus Session; Reserved For Exclusive Conference Partner**

 Sarah Murray
Lead Behavioural Architect
Cowry Consulting



10.45 Morning Refreshment Break With Informal Networking

DATA-DRIVEN CX STRATEGIES

11.15 **Leverage Customer Data & Behavioural Insights To Drive Personalisation & Powerful Customer Experiences For Positive Outcomes & Impressive Bottom-Line Results**

- Beyond inflows and outflows! Address the need for higher quality with in-depth customer data insights captured throughout the customer journey for a truly holistic understanding
- Navigate complex data sets to identify customer values and optimise insights to unlock tailored personalised experiences for your customers
- Evaluate legacy systems and discover the latest data storage technologies to secure sensitive data and build upon trust and security with your customers

 Ange Johnson de Wet
Business & Commercial Banking Technology
Lloyds Banking Group



CUSTOMER-CENTRIC CULTURES


PANEL

11.40 **Inspire Employees To Go Above-&-Beyond & Create A Company Culture Which Places Customers At The Heart Of Every Decision To Create Brand-Boosting Moments Customers Won't Forget**

Q&A


UPDATES!

- What does 'outstanding customer experience' mean in 2023? Unite the silos with a holistic approach to service design and customer duty for a clear message employees can get behind and commit to
- Happy employees = happy customers! Consistently monitor tangible metrics of employee performance and engagement to benchmark success and preserve a truly customer-centric company culture
- How can Financial Services reassure hesitant employees during times of disruption, change and digital transformation and secure their buy-in to deliver good customer outcomes?

 Jakub Weber
Director, Client Experience, Strategic Advisor




BNY Mellon

 Sharna Thomson
Head of Customer




Zurich Insurance

 Ross Coombs
Product Manager




JP Morgan Chase

 Karen Coleman
Director of Customer Operations



Wesleyan Assurance

 Jürgen Blumberg
Head of ETF Product & Capital Markets



Goldman Sachs

12.10 **Bonus Session; Reserved For Exclusive Conference Partner**

12.40 Lunch & Informal Networking For Speakers, Delegates & Partners



Outstanding Customer Journeys ■ Changing Customer Behaviours & Expectations ■ Data-Driven CX Strategies ■ Customer-Centric Cultures ■ New Tech & AI Innovations ■ Vulnerable Customers ■ Measurement & ROI ■ Digital Vs. Human Touch ■ The Strategic Role Of CX

13.40 **Afternoon Chair's Opening Remarks**



Fergus Murphy
Group Customer Experience Officer
Virgin Money UK



OPENING REMARKS

NEW TECH & AI INNOVATIONS

DOUBLE PERSPECTIVE

13.50 **Monetise The Latest, Innovative New Tech & AI Paving The Way To The Future Of Market-Leading Customer Experiences In Financial Services**

WHAT'S NEW?

- Open banking, ChatGPT, quantum computing... what's next? Leverage the latest consumer trends and how to best support them through change for seamless and streamlined customer experiences
- The ethics behind AI and personalisation: how can you programme technologies to account for each and every customer demographic for all-inclusive, ethical AI decision-making?
- How can you secure buy-in and maintain your organisational culture when fundamentally changing individual roles and how whole teams operate with new tech and AI?

13.50 Tom Clay
Head of Data Science
Covéa Insurance Plc



14.10 Bhavik Mohandas
Director of Digital Products
American Express



CUSTOMER DUTY & VULNERABLE CUSTOMERS

NEW FOR 2023!

14.30 **Examine How Vulnerability Continues To Evolve Against The Backdrop Of The Pandemic & Cost-Of-Living Crisis To Pinpoint Signs Of Vulnerability, Enhance Your Support Strategies & Further Customer Duty Promises**

COST OF LIVING CRISIS

- Proactively identify and help to prevent newly financially vulnerable customers from difficulty by maximising Covid-19 and cost-of-living data insights and driving outcome-focused strategies
- Where we need empathy, we need human interaction! Equip your workforce with the right tools and skills to handle difficult situations, support vulnerable customers effectively and deliver positive outcomes

- How can you prepare for and combat the increased risk of fraud and scams throughout challenging times? Build and maintain trust with your customers with comprehensive financial literacy education to ensure each and every customer has access to the support they need



Vicki Heslop
Director of Customer Experience
Covéa Insurance Plc



14.50 **Bonus Session; Reserved For Exclusive Conference Partner**

15.20 Afternoon Refreshment Break With Informal Networking

MEASUREMENT & ROI

15.50 **Measure, Assess, Refine, Repeat! Identify The Tangible Metrics To Best Measure Customer Outcomes & Benchmark Performance To Meet Regulatory Requirements & Drive ROI**

- Harness the latest outcome measurement techniques for improved customer experiences and to evidence customer duty to customers and regulatory bodies
- Measure, capture and action customer insights to better understand your customers at various touchpoints along customer journeys and translate these into refined and personalised FS customer experience strategies
- What gets measured, gets managed – harness customer feedback and translate findings into action to enhance and improve your CX strategies that secure customer retention and sustained customer engagement



Alessandra Canavesi
Head of Digital Marketing & Customer Experience
AXA



DIGITAL VS. THE HUMAN TOUCH

DOUBLE PERSPECTIVE

16.10 **Exceed Evolving Customer Needs & Service Expectations With Streamlined Digital Touchpoints & Meaningful Human Interactions For Ultimate Success**

STREAMLINE FOR SUCCESS

- In-branch vs. online: how can you balance inclusion, digital progression, and the varied and often conflicting demands of multi-generational customers in today's digital-first world?
- Deliver meaningful human contact when emotions are high and customers are vulnerable to foster trust and build safe and open relationships
- Translate critical data-driven insights directly into your strategies by analysing how customers interact with digital products for continuous improvement and maintained coherent experiences

16.10 Mevs Chaudery
CX Specialist - Corporate Sales & FX
Citi



16.30 Anna Roughley
Head of Insight & Engagement
Lending Standards Board



THE STRATEGIC ROLE OF CX

PANEL

16.50 **Secure CX As A Strategic & Valuable Business Function With Critical Data Insights & Proven Results To Ensure Long-Term Buy-In**

Q&A

SECURE BUY-IN

- Continually assess changing customer behaviours and feedback for business-critical insights which inspire consistent improvements to make your CX teams stand out
- What service design models and internal team structure is best to execute your CX strategies for proven, tangible results?
- Ensure CX and customer duty remain key strategic priorities for your financial service organisation with client-centric focused teams who effectively deliver your winning CX strategies



Zac Shander-Kelsey
IMCX Product Owner
BNY Mellon



Dave Priestley
Chief Product Officer
Vitality



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

CLOSING REMARKS



Fergus Murphy
Group Customer Experience Officer
Virgin Money UK



4 Easy Ways To Register

- Online @ www.financialservicesconference.com
- Phone +44 (0) 20 3479 2299
- Post this booking form to Global Insight Conferences, 5-11 Lavington Street, London, SE1 0NZ
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Price	Standard Rate
Inhouse/Brand	£599 + VAT
Agency/Supplier/All Other Companies	£1,099 + VAT
Group Of 4 (Inhouse Brand Only)	£1,797 + VAT SAVE £399
Exhibition Stand & 2 Delegate Places	£4,999 + VAT

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- Speaker notes available to download one week after the conference, subject to speaker disclosure.
- Only one discount can be used per registration.
- Please note VAT will be charged at 20% and all registrations are subject to a 4% booking fee.

Programme Alterations: Conferences are organised many months in advance of the conference itself and sometimes we may need to make substitutions, alterations or cancellations of the speakers and/or topics. Whilst we make every effort to find a direct replacement if a speaker cancels, sometimes this is not always possible within the timeframes we are given. Any substitutions or alterations will be regularly updated on the conference website.

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Brochure Code:

A One-Day, Industry-Led Conference & Networking Exhibition
London, 13th June 2023



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Can You Help Financial Services Organisations Deliver Exceptional, Outcome-Focused & Insight-Led Customer Experiences?

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