Behavioural Insights, Real Value

Financial

Services Brands

1 Day

WWW.FINANCIALSERVICESCONFERENCE.COM

Outstanding, Outcome-Focused Customer Journeys: Deliver proactive, value-adding and seamless customer journeys which boost the bottom line

Changing Customer Needs, Behaviours & Expectations - Unlocking Insights: Keep pace with changing demands to maintain customer satisfaction and execute a value-driven and competitive experience

Power Data Insights For Tailored, Customer-Centric CX Strategies! Leverage customer data and behavioural insights across customer touchpoints to drive impressive bottom line results

Customer-Centric Cultures Which Inspire Employees: Embed customer-centricity into the heart of your organisation and inspire employees to go above and bevond

Monetise Cutting-Edge Tech & Al **Innovations:** Harness next-generation technologies and Al for market-leading customer experiences

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

Measure, Assess, Refine, Repeat - Drive **ROI:** Review your CX performance with tangible metrics that benchmark success

Streamlined Digital Vs. Meaningful Human **Interactions:** Balance streamlined, digital-first customer experiences without sacrificing the human touch

Secure The Strategic Role Of CX In Financial **Services:** Demonstrate proven results and value and win long-term buy-in

Next-Gen FinTech. Challenger & Disruptor Insights!

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**

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



Alessandra Canavesi Head of Digital Marketing & Customer Experience

AXA





Sharna Thomson

Head of Customer



Ange Johnson de Wet Business & Commercial Banking





Fergus Murphy Group Customer Experience Officer





CHASE 🗅

Kevin Murphy Integration & Programme Lead. Youth & Families



Dave Priestley Chief Product Officer



NatWest Group Vitality



Jakub Weber Director, Client Experience, Strategic



BNY Mellon. Securities **Services & Digital**

American Express

ZURICH

Bhavik Mohandas Director of Digital Products



American Express



Karen Coleman Director of Customer Operations

Weslevan **Assurance**



Andreas Pantazopoulos Head of Client Insight



IP Morgan

Chase



CX Specialist -Corporate Sales & FX



Citi



Laurence Veale Head of Experience

AIB Bank



Louise Allemange Compliance Manager

Lending Standards Board

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Goldman Sachs

lürgen Blumberg Head of ETF Product & Capital Markets

Goldman Sachs



Vicki Heslop Director of Customer Operations

Insurance Plc

Coutts



HSBC

Ashlev Driver Global Head of Digital Adoption - Commercial

HSBC



Anna Roughley Head of Insight & Engagement

Lending Standards **Board**

Head of Data Science

Insurance Plc

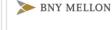


Cowrv Consulting

Sarah Murray

Architect

Lead Behavioural



Zac Shander-Kelsey Proposition & Client Experience Manager

BNY Mellon

NEW Thought Leadership!

• 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:

o Customer-Centric Cultures

o Changing Customer Behaviours & Expectations • New Brands, Content & Case Studies!

o Vulnerable Customers & The Cost Of Living Crisis

FinTech & Disruptor Insights

Organised By:



Covéa

CX, Customer Journey, Product & Digital Leaders In Financial Services Explore Business-Critical, Data-Driven Strategies For Measured, Transformed & Outstanding End-To-End Customer Journeys With A Human-Centred Service Design Which Embraces Innovative Digital & Technology, Supported By A Company-Wide Drive To Provide Good Financial Outcomes For Shifting Customer Behaviours & Vulnerable Customers, Furthering Customer Duty Promises & Securing CX As A Strategic Business Function

08.30 Registration, Informal Networking & GIC Welcome



09.10 Morning Chair's Opening Remarks



Fergus Murphy Group Customer Experience Officer

Virgin Money UK



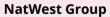
OUTSTANDING CUSTOMER JOURNEYS

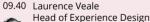
09.20 Drive Positive Financial Outcomes Across Your Service Delivery To Meet Regulatory Pressures, **Maximise Financial Wellbeing For Customers & Boost Lovalty**

- 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
- 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





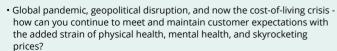


AIB Bank



CHANGING CUSTOMER BEHAVIOURS & EXPECTATIONS





- 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



Louise Allemange Compliance Manager

Lending Standards Board



Coutts



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



Sarah Murray Lead Behavioural Architect

Cowry Consulting

cowry consultina l

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
- Evaluate legacy systems and discover the latest data storage technologies to secure sensitive data and build upon trust and security with your customers



TOPIC

Ange Johnson de Wet **Business & Commercial Banking** Technology

Lloyds Banking Group



CUSTOMER-CENTRIC CULTURES

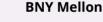
11.40 Inspire Employees To Go Above-&-Beyond & Create A Company Culture Which Places Q&A **UPDATES! Customers At The Heart Of Every Decision To Create Brand-Boosting Moments Customers Won't Forget**

- 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
- 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?



lakub Weber Director, Client Experience, Strategic Advisor



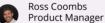




Sharna Thomson Head of Customer

Zurich Insurance





IP 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 & Al Innovations ■ Vulnerable Customers ■ Measurement & ROI ■ Digital Vs. Human Touch ■ The Strategic Role Of CX

• How can you prepare for and combat the increased risk of fraud and scams

13.40 Afternoon Chair's Opening Remarks



Fergus Murphy Group Customer Experience Officer **Virgin Money UK**



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

Director of Customer Experience

Covéa Insurance Plc

16.10 Mevs Chaudery CX Specialist - Corporate Sales & FX Citi



Anna Roughley Head of Insight & Engagement



Lending Standards Board



NEW TECH & AI INNOVATIONS

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

- 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 Clav



Head of Data Science Covéa Insurance Plc



14.10 Bhavik Mohandas



Director of Digital Products American Express **American Express**

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

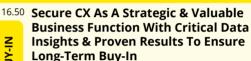


Alessandra Canavesi Head of Digital Marketing & Customer Experience

AXA



THE STRATEGIC ROLE OF CX





 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-Kelsev IMCX Product Owner

BNY Mellon





Dave Priestlev Chief Product Officer

Vitality

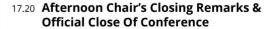


CUSTOMER DUTY & VULNERABLE CUSTOMERS

- 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**
 - 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

DIGITAL VS. THE HUMAN TOUCH

- **Exceed Evolving Customer Needs & Service Expectations With Streamlined Digital Touchpoints & Meaningful Human Interactions For Ultimate 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
- Translate critical data-driven insights directly into your strategies by analysing how customers interact with digital products for continuous improvement and maintained coherent experiences





Fergus Murphy Group Customer Experience Officer

Virgin Money UK









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Group Of 4 (Inhouse Brand Only)	£1,797 + VAT	SAVE £399
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Group Discounts: 4 delegates for the price of 3. Or send 3 and get your third place half price! (This applies to inhouse practitioners only, not agencies and suppliers, and cannot be used in conjunction with any other discounts, including earlybird offers)



- · 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.

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A One-Day, Industry-Led Conference & Networking Exhibition

London, 13th lune 2023

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Please complete in capitals. Photocopy for multiple bookings.

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