

The Financial Services Customer Experience Conference
13th June 2023
1 America Square, London EC3N 2LS



Welcome To The Financial Services Customer Experience Conference!

Official Event Programme

Please note that the following 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.

Organised By:



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Registration, Informal Networking & GIC Welcome

08.30 - 09.10

Morning Chair's Opening Remarks

09.10 - 09.20

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

Outstanding Customer Journeys

09.20 - 10.00

Double Perspective: 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

Perspective One: 9.20 - 9.40

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

Perspective Two: 9.40 - 10.00

Laurence Veale, Head of Experience Design, **AIB Bank**

Bonus Session: Reserved for Exclusive Sponsor Speaker

10.00 - 10.15

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Phillip Hoyer, Field CTO, EMEA, **Okta**

Changing Customer Behaviours & Expectations Panel

10.15 - 10.45

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

- 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?

Ashley Driver, Global Head of Digital Adoption- Commercial Banking, **HSBC**

Anna Roughley, Head of Insight & Engagement, **Lending Standards Board**

Mona Christensen, Head of Client & Product Outcomes, **Hargreaves Lansdown**

Vikas Gujral, Director Transformation and Customer Experience, **Bupa**

Bonus Session: Reserved for Exclusive Sponsor Speaker

10.45 - 11.00

The Power of Behavioural Science: Promoting Digital Adoption and Delivering the Best Customer Experience

- Behavioural science is the key to unlocking consumer behaviour. Insights from behavioural science allow us to understand how our customers make judgements and decisions, and consequently create products and services that drive the best experience.

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- Increasingly, businesses are focusing on digital adoption and driving consumer self-serve. Learn how behavioural science can be leveraged to spearhead this transformation, maintaining a focus on customer experience and delivering results with impact!

Sarah Murray, Head of Behavioural Architecture, Cowry Consulting

Si McNair, Behavioural Architect Manager, Cowry Consulting

Morning Refreshment Break

11.00 - 11.40

Bonus Session: Reserved for Exclusive Sponsor Speaker

11.40 – 11.55

David Geffen, VP Product Marketing, **Glassbox Digital**

Customer-Centric Cultures Panel

11.55 – 12.25

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

- 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?

Sharna Thomson, Head of Customer, **Zurich Insurance**

Ross Coombs, Product Manager, **JP Morgan Chase**

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Jürgen Blomberg, Head of ETF Product & Capital Markets, **Goldman Sachs**

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12.25 - 12.40

Elevating Financial Services: Unleashing the Power of Customer Experience and AI

- Cory will be discussing the critical role of customer experience (CX) in the financial services industry and highlight how it can become the differentiating "product" for balance sheet businesses.
- Sprinklr will be sharing practical advice and strategies to help you decode the magic of AI and build (scalable) exceptional customer experiences, so you can create lasting relationships with your customers and stay ahead in the competitive landscape of financial services.

Cory Declusin, Director-CX(M) Best Practices, **Sprinklr**

Lunch & Informal Networking For Speakers, Delegates & Partners

12.40 - 13.40

Afternoon Chair's Opening Remarks

13.40 - 13.50

Mona Christensen, Head of Client & Product Outcomes, **Hargreaves Lansdown**

New Tech & AI Innovations

13.50 - 14.10

Monetise The Latest, Innovative New Tech & AI 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 consumers trends and how to best support them through change for seamless and streamlined customer experiences

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- 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?

Tom Clay, Head of Data Science, **Covéa Insurance PLC**

Customer Duty & Vulnerable Customers

14.10 – 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
- 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 customers has access to the support they need

Vicki Heslop, Director of Customer Experience, **Covéa Insurance PLC**

Bonus Session: Reserved for Exclusive Sponsor Speaker

14.30 – 14.45

The move from CCaaS to CXi: Extraordinary Experiences from the Digital Doorstep Across the Entire Journey

Ben Hill, Digital Expert, **NICE CXone**

Afternoon Refreshment Break With Informal Networking

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14.45 – 15.25

Digital vs. Human Touch

15.25 - 16.05

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 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 across multi-channel offerings

Perspective One: 15.25 – 15.45

Mevs Chaudery, CX Specialist- Corporate Sales & FX, **Citi**

Perspective Two: 15.45 - 16.05

Anna Roughley, Head of Insight & Engagement, **Lending Standards Board**

The Strategic Role of CX

16.05 – 16.35

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

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- 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

Meera Rao, Lead User Experience Designer, **Cyber-Duck**

Nidhi Singh Dhamija, Director Product Delivery Europe, **Mastercard**

Zac Shander-Kelsey, IMCX Product Owner, **BNY Mellon**

Afternoon Chair's Closing Remarks & Official Close Of Conference

16.35 - 16.45

Mona Christensen, Head of Client & Product Outcomes, **Hargreaves Lansdown**