

Registration, Informal Networking & GIC Welcome

08.30 – 09.00

Morning Chair's Opening Remarks

09.00 – 09.10

Tracy Watkinson
Chief Operating Officer
NatWest Group

AI & Automation – Application, Value & Benefits

09.10 – 09.40

Uncover The True Value Of AI & Examine Real-Life Applications To Enhance Customer & Colleagues' Digital Experiences For Future-Driven Tech Benefits

- Determine the true value of AI to decrease operating costs and drive customer engagement by applying AI and automation for both customers and colleagues
- Examine how AI is driving product preference from customers to evaluate how to maximise automation to improve personalisation and recommendations
- How can you quantify and measure the value of AI to win buy-in and overcome sceptics?
- Tactically embed AI into your FS strategies to maximise return on time and investment for real results

Richard Thomas
Head of Architecture
Atom Bank

Anuradha Deshpande
Head of Product Support
GoCardless

Ludwig Mallia
Head of Digital Factory & Channels
BOV

BNY Mellon – Use Of AI

09.40 – 10.00

An Exclusive Insight Into The Real-Life Applications Of AI To Enhance Value & Maximise Client Experiences

The Digital Transformation & Innovation In Financial Services Conference
27th September 2022

The Law Society, 113 Chancery Lane, London, WC2A 1PL

BNY Mellon built a product that uses AI to predict failing trades, thus allowing clients to get ahead of a trade before it actually fails. Discover insights on how AI can be utilised to create new value-adding products by leveraging existing data in your domain to enhance value for clients.

Javier Vicente
Lead Data Scientist
BNY Mellon



Bonus Session; NICE

10.00 – 10.15

Engaged Agents: The Power To Empower

Hiring and onboarding agents is simply not enough to keep employees happy and engaged, you need to develop them into empowered problem solvers. Find out how.

Gregg Widdowson
Director of Sales Engineering
NICE

Morning Refreshment Break With Informal Networking

10.15 – 10.45

Customer Insights, Expectations & Journeys – Panel Discussion

10.45 – 11.25

Keep Up With Constantly Changing Consumer Trends & Expectations To Create Value-Adding, Seamless, Personal & Efficient Customer Journeys Which Boost Engagement & Drive Loyalty

- Digital is on customers' minds more than ever, so how can you identify the types of digital finance they are *expecting* in your digital offering?
- Maximise strategies to navigate data security requirements to offer hassle-free customer journeys while remaining compliant and building critical consumer trust
- Take the next step! From personalisation to online interactivity, discover new and innovative methods to create first-class customer journeys in financial services today
- How can you power engagement and make sure that your Financial Services customer service is value-adding?

Brian Stewart
Global Head of Customer Insight, Digital Experience & Analytics
AXA Investment Managers UK Limited

Daniel Thomson
Head of Customer Propositions
Lloyds Banking Group

Rachel Harris

Director, Digital Channels

Standard Chartered Bank

Gillian Forrest

Director, Enterprise Programmes

Barclays UK

Peter Lemon

Sales Development Representative

FICO

Cultural Transformation

11.25 – 11.45

Bring Digital Transformation To The Forefront Of Your Strategies & Company Culture & Seamlessly Embed This Into The Heart Of Your Company's Mission & Values

- Overcome lingering hesitations to move to digital to stay ahead of the industry curve and rising customer expectations
- How can you engage and support your team with rapid internal changes to maximise investment in digital solutions?
- Ensure your organisation continuously explores the latest innovative digital tools and channels to drive forward continuous transformation
- Benchmark success and explore lessons learned to add long-term value

Geraldine Maringo

Chief Product Owner

Nationwide Building Society

Bonus Session; Moxo

11.45 – 12.00

Modernizing Client Interaction Workflows In Financial Services

- Modernize your client interaction management with a secure, onestop interaction workflow platform
- Building a onestop hub to manage your complete client life cycle in banking across account onboarding, account servicing, and exception handling
- Rethinking today's costly, inefficient, and fragmented client engagement model, which requires significant manual intervention
- Streamline client business processes across your finance firm and orchestrate each step of your workflows to fast-track client business

Shimona Pinto
Senior Corporate Solutions

Moxo

Data Strategies

12.00 – 12.20

Collect, Capture & Leverage Data To Compliantly & Efficiently Drive Customer Experiences & Engagement In Financial Services

- Unlock meaningful insights from data measurement and translate them into actionable concepts which streamline transformation and support digital change
- How can you make the most of data and analytics whilst remaining compliant amidst growing new regulations?
- From personalised banking to targeted marketing: capitalise on the most effective data uses to create seamless customer journeys
- When public concerns around data collection are higher than ever, how do you draw the line between the useful and intrusive and demonstrate the value and benefits to consumers?

Ludwig Mallia
Head of Digital Factory & Channels

BOV

Lunch & Informal Networking For Delegates, Speakers & Partners

12.20 – 13.20

Afternoon Co-Chairs' Opening Remarks

13.20 – 13.30

Sol Enenmoh
Head of Digital Transformation

Vanquis Bank

Bonus Session; Toluna & Harris Interactive

13.30 – 13.45

Digital Consumer 2022: From Insights To Innovation

- What are clients prioritising their research on? (= market understanding & NPD)
- What does the consumer digital landscape look like in 2022?
- How are clients embracing agile solutions to support their digital transformation & innovation

Michael Worledge
Head of Financial Services, Sales & Research EMEA

Simon Furey

Enterprise Account Director, Sales & Research EMEA

Toluna

Digital Transformation & Innovation - Double Perspective

13.45 – 14.25

Set-Up, Set-Backs & Success: Examine Robust & Pioneering Strategies To Drive Your Digital Transformation & Innovation Journeys Forward

- Secure company-wide backing and optimise the value of the latest digital processes by overcoming internal doubts, fear and organisational reluctance around large-scale digital transformation
- Real-time guidance on how to translate curiosity around digital transformation into actionable, practical and profit-boosting results (customer, business, technology, risk, and people)
- How can you ensure you have the right digital, business, and technology architecture in place to support your transformation portfolio
- From concept to viable product and successful integration and adoption... benchmark success by exploring timelines and critical lessons-learnt

13.45 Digital Transformation & Innovation

Rowena Everson

Head Digital Channels & Data Analytics

Standard Chartered Bank

14.05 Humanisation Of Wholesale Digital Banking & Transformation

Edward Ahtner

Global Head of Wholesale Digital Transformation

HSBC

Bonus Session; Quadient

14.25 – 14.40

"It's Not You, It's Me:" Fixing The Financial Services CX By Transforming Your CX Team

- Starting out correctly: providing the necessary foundation for every CX project
- Increasing your funding: guaranteeing funding for CX projects, AND a positive end result
- Building an army: using technology to drive a companywide CX-first culture change
- Beyond understanding: the critical next step for CX teams

Nick Emanuel

Solutions Architect

Quadient CXM

14.40 – 15.10

Build Financial Capability & Bridge The Digital Divide

15.10 – 15.40

From Internal Culture To Consumer Divisions: Explore Real-Life Digital Applications Which Enhance Colleague & Consumer Experiences In A Digital-First World

- Tackling generational differences! How can you make sure that those who aren't demanding digital finance don't fall behind and still feel supported by the services you provide?
- How can you digitise customer journeys and applications to make them increasingly accessible but still taking your most vulnerable customers into consideration?
- When consumer journeys are going at different speeds, explore how to satisfy all consumer bases to retain customer engagement and loyalty across the board
- How can digital technologies be harnessed to encourage customers, address their financial wellbeing, and build their financial literacy and capability?

Ulas Kishore

Senior Manager – Digital Customer Strategy

Lloyds Banking Group

Anna Roughley

Head of Insight & Engagement

Lending Standard Board

Digital & App Design & Usability

15.40 – 16.00

Harness Innovative Technologies & Transform Culture Through App Designs Which Boost Client Engagement & Business Performance

- Discover digital and app designs which are truly driven by customer insight and prioritise simplicity for user-friendly journeys
- From customer engagement to financial incentives and system efficiencies, what benchmarks can you use to track success and measure performance for boosted ROI?
- Examine the clarity and guidance needed during cultural change to deliver quick and agile digital transformation within Financial Services

Esin Over

Head of Digital Banking

First Direct

Tide Platform Limited Case Study

16.00 – 16.20

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Transforming QA For The Agile Teams

Kumar Ashok
QA Automation Lead
Tide Platform Limited

Afternoon Co-Chairs' Closing Remarks

16.20 – 16.30

Sol Enemoh
Head of Digital Transformation
Vanquis Bank

Official Close Of Conference

16.30