6TH ANNUAL
DIGITAL
TRANSFORMATION &
INNOVATION 29.09.2026
FINANCIAL SERVICES
www.financedigitalconference.com

Welcome To The Digital Transformation & Innovation In Financial Services 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:

gic
GLOBAL INSIGHT
CONFERENCES

08.30 Registration & Informal Networking

09.00 **GIC Welcome & Morning Chair's Opening Remarks**

Craig Bridger
Partner & Senior Operations & Performance Manager
John Lewis Financial Services

CUSTOMER EXPERIENCE & DIGITAL INCLUSION - PANEL DISCUSSION & Q&A

09.10 **Harness AI & New Technologies To Revolutionise End-To-End Customer Experiences Across Financial Services Platforms**

- Explore what customers really want and effectively utilise customer data and feedback to enact meaningful change both for the customer and within your CX operations
- Design inclusive digital experiences and deliver consistently high-quality experiences that are accessible for all users
- Explore how new technologies can enable personalised and seamless customer experiences that further engagement and foster long-lasting relationships

Heather Masterman
Digital Product Manager
Vitality

Nigel Guy
Director - Data Migration Lead & AI Strategist
Sumitomo Mitsui Banking Corporation

Nick Emanuel
Lead Senior Solution Architect
Quadient

Aysara Yusupova
Head of Digital Channels & Data Analytics, Europe
Standard Chartered Bank

TRANSFORMING CUSTOMER COMMUNICATIONS FASTER

09.50 **STRATEGIC CLARITY AS THE CATALYST FOR CHANGE**

Transforming customer communications is no longer just a question of replacing legacy technology. In financial services, the organisations making the fastest progress are those with the clearest strategy, the strongest alignment with the ExCom, and the most joined-up approach across the business.

In this session, Barney Hosey, General Manager from Broadridge Customer Communications and George Cairns, former Lloyds Banking Group transformation leader, will explore why strategic clarity is the real catalyst for change. Together, they will examine how financial firms can align customer, compliance, operations and technology priorities to accelerate transformation and drive digital growth.

Drawing on George's experience at Lloyds Banking Group, the session will highlight how a clear vision and cross-functional alignment can unlock faster progress and stronger business performance.

Barney Hosey
General Manager at Broadridge Customer Communications
Signal, a Broadridge company

George Cairns
Communication Transformation Consultant
Consultant

FIRESIDE CHAT: GOVERNANCE & REGULATIONS

10.05 **Navigate A Complex Regulatory Landscape With Confidence & Foster Effective Governance & Compliance Frameworks To Drive Ethical Digital Transformation Across Every Level Of The Organisation**

- Gain crucial insights into the regulatory landscape and how to keep pace with evolving regulatory developments and changes
- How can effective governance frameworks be expanded to encompass AI and new technologies and embed rigorous standards of transparency and accountability across every level of the organisation?
- How can multinational firms successfully navigate differing global standards and requirements while maintaining a unified and comprehensive digital strategy?

- From Consumer Duty to the EU AI Act, discover how to craft core governance structures such as key roles, responsibilities and oversight model to ensure a comprehensive response to evolving regulations

Ian Phoenix
Director - Intelligence, Digital & Innovation
Financial Conduct Authority

DATA MOBILITY & COMPUTE LIQUIDITY

10.45 **Accelerating Financial AI Workloads**

While more than 70% of AI workloads run in the cloud, the massive, secure datasets required by financial institutions largely remain trapped on-premises—leaving scarce, expensive GPUs sitting idle up to 95% of the time while waiting for data. This session reveals how to break this data bottleneck using Qumulo, instantly projecting data across hybrid environments to maximize your compute liquidity, slash infrastructure costs, and dramatically accelerate time-to-insight

Tom Tasker
Principal Cloud Solutions Architect
Qumulo

11.00 **Morning Refreshment Break With Informal Networking**

11.30 **Morning Chair Welcome Back**

Chris Kirk
Senior Risk & Control Manager
Monzo

AI TRANSFORMATION THAT LASTS

11.30 Most companies have already bought the AI tools — but the ROI isn't where it should be yet. Engineers are using AI without approval, the board wants a strategy, and competitors are claiming productivity gains you can't verify.

In this talk, we'll look at why AI transformation so often stalls — and how to execute it in a way that actually lasts. Infinum has gone through this process itself over the last two years: we restructured our teams, redefined our ways of working, and trained 90% of our engineers in structured sprints. That experience became a program we've since run in organizations across financial services, telecoms, and logistics.

The hard part was never the technology. It's getting an organization to change around it — and we'll show you the approach that makes it stick.

Jonathan Boakes
Managing Director UK
Infinum

Fintech bought the AI tooling. Almost nobody can show the ROI.

Your competitors are claiming productivity gains, your board wants measurable change, and your organization is still struggling with AI adoption. No governance that enables progress, nobody driving it day-to-day, and no way to measure what actually works.

Infinum, a global tech consultancy and digital product agency, went through this over the last two years. We restructured our teams, redefined our workflows, and trained 95%+ of our workforce to become AI-first. The experience became a program we now run inside fintech, telco, and logistics enterprises.

We've been through AI transformation, not just advised on it. Join our talks for what we learned doing it.

DON'T MISS
OUR SESSIONS

11.15	PANEL AND Q&A	**Go Beyond Buzzwords: Foster Comprehensive Adoption Strategies & Develop Responsible AI & Automation Principles To Enable Effective AI Usage & Scalability**
11.55		**AI Transformation That Lasts by Jonathan Boakes, Managing Director UK, Infinum**

Interested in discussing regulated AI adoption, or building custom AI solutions for fintech?

Scan the code to explore our services.

INFINUM

AI & AUTOMATION - PANEL DISCUSSION & Q&A

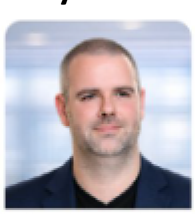
11.45 **Go Beyond Buzzwords: Foster Comprehensive Adoption Strategies & Develop Responsible AI & Automation Principles To Enable Effective AI Usage & Scalability**

- Cutting through the noise: demonstrate the proven and practical value of AI to senior leaders to encourage meaningful implementation of AI throughout the organisation
- Build effective and actionable processes for AI adoption to increase revenue, decrease operational risk and optimise digital transformation capabilities
- Emphasise the importance of responsible AI and discover effective strategies for bias mitigation, due diligence and compliance
- What's next in AI and automation? Examine the current landscape and emerging trends to shape strategic decisions and stay ahead of the curve

Ambuj Kumar
VP Product Management
Formerly of AXA XL

Jonathan Boakes
Managing Director UK
Infinium

Jonathan Smith
Head of GCOO Process Office
Lloyd's Banking Group



Sacha Fellica
Executive Direction, Head of Sales Clients Platforms & Sales Applied AI
JPMorgan Chase & Co.

FIRESIDE CHAT: DECENTRALISED FINANCE

12.25 **From Crypto & Blockchain To Tokenisation, Unpack The Emerging Opportunities & Challenges In Decentralised Finance & The Impacts On Financial Service Structures**

- Discover key insights on decentralised finance and the tokenisation of traditional assets and the potential such developments have within financial services and markets
- Should financial services be getting more involved in decentralised finance opportunities? Unpack the risks and opportunities posed by decentralised finance and its impact on the broader sector
- How can decentralised finance be utilised safely within financial services? Develop frameworks to safely engage with decentralised finance whilst ensuring stringent risk management

Prab Bajwa
Managing Director, Senior Digital Asset Risk Officer
State Street

INNOVATION IS BECOMING EXECUTION

12.45 **How Financial Services Can Operationalise Agentic AI**

AI has moved from experimentation to execution. Innovation is becoming execution. For financial services organisations, the challenge is no longer simply understanding what AI can do but finding a way to put it to work safely, securely and at scale within highly-regulated environments. This session explores how organisations can move beyond isolated AI use cases and operationalise agentic AI across real-world workflows — balancing governance, security, human oversight, and auditability with the need to innovate and deliver measurable business value.

Discover how SS&C Blue Prism WorkHQ brings people, AI agents, digital workers, and enterprise systems together through a governed orchestration layer designed to make AI-powered work operational. Drawing on SS&C's own experience as Customer Zero, we'll explore what it takes to move from AI ambition to AI in action — and turn innovation into execution.

Mr. Brian Halpin
Financial Services Industry Principal
SS&C Blue Prism

13.00 **Lunch & Informal Networking For Speakers, Delegates & Partners**

14.00 **Afternoon Chair's Opening Remarks**

Marili Anderson
Managing Director, Head of Compliance UK
Rabobank

CLARITY UNDER PRESSURE

14.15 **What Military Leadership Can Teach Us About Governance & Regulation**

- Creating clarity of mission, ownership, and accountability in governance
- Enabling fast, confident decision-making within clear guardrails
- Applying governance principles to AI and emerging technologies
- Navigating regulatory complexity across jurisdictions
- Build governance frameworks that are resilient under pressure

Chris Kirk
Senior Risk & Control Manager
Monzo

DELEGATE DISCUSSION: ORGANISATIONAL AI MATURITY & REAL WORLD EXPERIENCES OF DEVELOPING TEAMS

14.35 **Please Refer To Your Worksheets**

We would encourage you all to enter into the spirit of the day and to share ideas with fellow delegates. We understand there might be commercial sensitivities behind discussing strategies, however, there is a lot to be gained from sharing theories, mindsets and abstract situations – the person sat next to you might just have that fresh outlook which unlocks new potential!

14.55 Afternoon Refreshment Break With Informal Networking

NEW TECHNOLOGIES & EMERGING TRENDS

15.25 **Effectively Leverage New Technologies & Next-Gen Tools To Optimise Capabilities, Drive Efficiencies & Maximise Impact**

- Unpack the potential of new technologies to optimise capabilities, drive efficiencies and enhance customer experiences
- Which new technologies and solutions are delivering quantifiable ROI across financial services, and how can they be effectively utilised and adopted to generate maximum value?
- Culture of compliance: stay ahead of potential cyber threats from new technologies and ensure an awareness of regulations and data protection strategies across the organisation
- What's next? Explore emerging trends like quantum computing to stay one step ahead and understand their potential to transform financial services

Daniel Bowyer
Director of Business Intelligence & Automation
Barings

DIGITAL LITERACY AND THE FUTURE OF THE WORKFORCE - PANEL DISCUSSION

15.45 **Empower Teams To Embrace AI With Confidence & Enhance Their Digital Literacy & Unpack The Shifts Shaping The Future Of Work**

- Enhance your understanding of the practical applications of AI and discover how employees can synergise their skillsets to work alongside these technologies to streamline operations and maximise efficiencies
- Address concerns around job security in the face of AI adoption to prevent digital resistance, overcome unwanted distress and maintain an engaged workforce
- Discover effective training techniques to build an understanding of key terms, capabilities and limitations with AI usage and dispel internal concerns about AI adoption

Karrista Rayment
Technology Service Owner
Bank of England

Sarah Dryden
Senior Manager, Digital Procurement & Transformation
Nationwide

16.25 **Afternoon Chair's Closing Remarks**

16.30 Official Close Of Conference