



The Financial  
Services Forum

# Events

January–March

# 2016

Corporate partners

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# Welcome to our Calendar for January to March 2016

You will find enclosed a summary of The Forum's latest events, breakfast meetings, seminars and conferences, through to the end of March 2016. Please take a few moments to take a look through and fix dates in your diary.

As always, there is a variety of topics and discussions, covering the issues of greatest relevance and topicality for our membership community.

You will find events relevant to your current industry sector, but also seminars prepared for other interest groups. Please consider attending these too. There are lessons to be learnt from other sectors of the industry and opportunities to create business relationships with new companies and individuals.

Members attending these events have the opportunity to debate strategic thought-leadership as well as practical tips on marketing best practice.

In addition to our event programme we have our website. It's a fantastic resource offering greater access to timely, relevant, thought-leading content at a time that is convenient to you.

Online membership continues to grow rapidly, giving you greater opportunities to network with your contemporaries by sector, discipline and geographical region.

You can also download The Forum's event app via iTunes or Google Play. It's easy to use and allows you to register via your mobile, see who else is attending an event, view the speaker biographies and interact with your fellow delegates.

Through The Forum's events, website and communities, we aim to keep you fully-engaged with the rapidly changing world of financial services marketing.

I look forward to seeing you at our events in early 2016 and discussing financial services marketing issues on our new website.



**David Cowan**  
Managing Director  
The Financial Services Forum



## Schedule Key

**E**

### Event is open to Executive Members

Executive Membership is for senior industry executives who are either responsible for, or directly influence, their organisation's marketing strategy; typically, they will be at director level or equivalent.

**A**

### Event is open to Associate Members

Associate Membership is for those who are responsible for the execution of their organisation's marketing strategy; typically, they will report to a director.

**P**

### Event is open to Practitioner Members

Practitioner Membership is for directors and partners of agencies and consultancies within the advertising, direct marketing, digital, media planning and buying, design, branding, sponsorship, sales promotion, PR, research and evaluation fields.

Dates, timings and speakers for events may change. For the latest details, please visit the website: [www.theforum.co.uk](http://www.theforum.co.uk)



Tuesday 12  
Direct & Digital  
Marketing

E A

## Robos & Cyborgs – The Rise of The Machines

Robos and cyborgs are the disruptive application of technologies that will fundamentally change retail financial services. As every financial institution bank, advisory firm and platform is developing its robo and cyborg goals in the next 24 months will this lead to aggressive client acquisition or is it a 'must have' in order to enhance customer service and protect existing relationships? Or both? All the research suggests that a hybrid technology/human advice process is what the majority of people want and can afford. Our panel of (human) experts give their expert insight into the rise of the machines. Speakers: Dominic Traynor, Head of Digital, M&G (Chair); Ryan Barrows, Head of Business Development, Europe, Vanguard; Jason Chapman, Managing Director, Willis Owen.

Tuesday 19  
Asset  
Management

E

## More Power to the Brand

Many asset managers do not have strong brands. But with the sector selling a commoditized product and ongoing margin pressure, differentiation by brand identity could become increasingly crucial to success. Can brand also lead organisational culture? As recent years have shown, cultural failings can damage financial brands. However, those firms who understand how their cultures affect everything their customers experience are well-placed to deliver strong brand experiences. Our expert panel debates the issues. Speakers: Rob Taylor, FCA; Professor Bill Critchley; Henrietta Jowitt, Non-executive director at Newton Investment Management and Founder/Director at Rotation Point.

ACCUDELTA

Thursday 21  
Private Banking  
& Wealth  
Management

E

## Putting the Wow into Private Banking

How can you engage and deepen your relationships with HNW / UNHW in a highly regulated environment with products that don't naturally capture the imagination? Barclays 'Little Book of Wonders' is an innovative service that does just that, and has been gaining recognition and momentum with both clients and bankers for the past few years. Founded as a lifestyle service, bringing together editorial and experiential content from a network of brand partners, we hear about the thinking behind LBOW and how it has evolved to support the core marketing and business strategy. We bring together a senior audience over breakfast to explore the strategic marketing approaches that work in this esoteric but highly-valuable segment of the market. Speaker: Victoria Bennett, Partnership & Sponsorship Director, Personal & Corporate Banking, Barclays.



Tuesday 26  
General

E A P

## Predictive Marketing for Financial Services

Every financial institution is facing an explosion in customer data - transactional data, social data, web analytics, app usage and much more. When tracked and analysed, this wealth of information can give new insight and context into the journey of new and existing customers - exposing new opportunities to drive sales or avoid churn. But it won't stop there. Using predictive marketing analytics to retain, convert and service current customers can have a much bigger impact on the business - and on marketing's standing as the steward of customer experience. We will discuss why financial institutions are investing in predictive marketing, what can be learned from other industries that are ahead of the curve on predictive marketing adoption, and how you can phase-in analytic capabilities to build enduring customer relationships. Speakers: Andrew Davis, Co-Founder and CMO, Idio; Jeremy Waite, Head of Digital Strategy, EMEA, Salesforce Marketing Cloud

Thursday 28  
Brand Strategy

E A

## How Can Your Content Marketing Really Differentiate Your Brand?

No doubt about it, content marketing can play a huge part in amplifying what your brand stands for - and a pleasingly cost-effective part, too. But so far, we're still seeing too much that's generic, and too little that's genuinely bold and distinctive. How can you make your content marketing work harder to help build your brand? Our panel of experts has real and practical ideas on the subject. Speakers: Lucian Camp (Chair), Ian Henderson, AML; Niels Footman, Senior writer, Copylab.

Tuesday 2  
General

E A P

## The New Grammar of Marketing Strategy

Is marketing still thinking Shakespeare, while the world has moved to abbreviated text? We hear every day about the need for marketing to be less siloed but usually this is just between the 'traditional marketing teams'. This session is about a totally new marketing strategy and the grammar of it. Skills and practices need to be recombined in different ways. New teams, who previously sat outside of marketing, need to be created. Speakers: Stewart Conway, Head of Digital Marketing, Jupiter Asset Management.

Thursday 4  
Corporate  
Investment  
Banking

E

## Igniting Growth

How can marketing move itself centre stage in the traditional confine of C&IB? Does your customer experience reflect the brand values of your Bank? How can you align your brand values through the various touch points and ensure that your relationships are maintained and strengthened. Speakers: Catherine Toole, Chairman, Sticky Content.

Tuesday 9  
Retail Banking

E

## P2P: Why Bother With Banks?

With peer-to-peer (P2P) lending gaining the seal of approval of inclusion in ISAs, its impact on the savings market looks set to grow. How significant a threat is P2P to traditional banks and building societies? Do the higher rates on offer from P2P, along with the new Personal Savings Allowance for tax-free interest, mean that savers will give up on Cash ISAs? And while P2P continues to attract savers, concerns remain that consumers don't properly understand the risks involved. Is the marketing of this new asset class at fault, and how can we ensure that consumers aren't misled? Our speakers debate the implications of P2P for the retail banking sector.



Thursday 11  
General  
Insurance

E

## Ad Tech: New ways to acquire customers

What is the future of ad tech in financial services marketing? How can the insurance sector benefit from the advancements in online advertising software solutions? How can improvements in the delivery, display, targeting and control of online ads improve customer acquisition? Speakers: Tina Wild, Head of Global Media Strategy, Quantcast; Ed Cole, Digital Marketing Strategy Manager, Lloyds Banking Group.

Tuesday 23  
Life & Pensions

E






## How to Close the Retirement Saving Gap

Whatever the tax relief landscape for pensions, the challenge remains: how to persuade individuals to save more for a comfortable retirement. With pensions long seen as confusing and complex by consumers, how can the industry improve messaging and marketing effectiveness? What lessons can be learned from the popularity of ISAs and how can we build on the progress made by auto-enrolment? Are we missing some tricks from behavioural finance? Our expert panellists give their views. Speakers: Adrian Boulding, TISA.

... a range of sector and discipline specific communities relevant to my whole team ...

**Nigel Gilbert, Chief Marketing & Communications Officer, TSB**



<p>Tuesday 1 <b>Corporate Communication</b></p> <p><b>E A</b></p>	<p><b>Changing Internal Behaviours</b></p> <p>Regulators and the Government are pressurising CEOs and leaders of financial organisations to measure and monitor corporate culture. Former Business Secretary of State Vince Cable called for a summit to reshape culture and put transparency and employee confidence at the heart of every business. And, in response to the publication of the ‘Fair &amp; Effective Markets Review’ which calls for more accountability of individuals and ethical business practices the Bank of England Governor said, “the age of irresponsibility is over”. It is widely held that leaders form, shape and embed culture; and are themselves formed by culture. We will explore the levers and internal mechanisms in place that influence or promote the right behaviours in line with an organisation’s cultural values and what insights are needed to influence an organisation’s culture and change programme for improved customer service.</p>
<p>Thursday 3 <b>Retail Banking</b></p> <p><b>E</b></p>	<p><b>Monetising Innovation: What Banks Can Learn From FinTech</b></p> <p>As the pace of digitalisation rapidly advances, identifying new ways to win customers and keeping them loyal is imperative for banks. But with a multitude of external influencers increasing the number of new entrants to the market, has this now become more of a challenge than ever? Or is there an opportunity for banks to increase revenues by helping their customers manage their money better? What we know is that without decisive action banks risk being left behind, encumbered with an expensive and inflexible distribution setup. Showcasing the best concepts from around the world, this conference evaluates what banks can do to adapt to the changing landscape of consumer needs.</p> <p style="text-align: right;"><b>SIMON • KUCHER &amp; PARTNERS</b> Strategy &amp; Marketing Consultants</p>
<p>Tuesday 8 <b>General</b></p> <p><b>E A P</b></p>	<p><b>Marketing Effectiveness Showcase</b></p> <p>We invite winners from The Forum’s 2015 Awards for Marketing Effectiveness to present their case studies and share some of the insights and strategies that impressed our judges. Smart metrics and a tangible contribution to real business performance is what distinguishes genuine marketing effectiveness and these case studies provide a great example of how that can be achieved. Presentations include case studies from both B2B and consumer campaigns. This event is a curtain-raiser for The Forum’s 2016 Awards.</p>
<p>Tuesday 15 <b>Mortgages</b></p> <p><b>E</b></p>	<p><b>London Mortgages Forum</b></p> <p>Business leaders from mortgage lenders, key distributors networks and other professional service providers in the UK mortgage community gather to debate some of the biggest challenges facing the industry.</p> <div style="text-align: right;">      </div>
<p>Thursday 17 <b>General</b></p> <p><b>E A P</b></p>	<p><b>The Inflection Point for Financial Services Marketing?</b></p> <p>The first Members Conference of the Year will consider the key challenges that face marketing in Financial Services. Despite the efforts of some brilliant FS marketers, marketing has not developed as we would have liked. Is marketing of the future all about digital engineers and data scientists? Automation will raise everyone’s game in terms of the focus on, and understanding of, the consumer. It will empower marketers but digital innovation is not the panacea that will cure all ills. Today’s conference will hear compelling reasons why digital is the elixir so long missed. But in considering the future, where FS marketing does deliver above expectations, we look at the whole picture from all angles and deliver key strategic thinking that will affect all your businesses as we strive to really deliver those much talked about optimal customer outcomes.</p>
<p>Wednesday 23 <b>General</b></p> <p><b>E A P</b></p>	<p><b>Meet the Marketer</b></p> <p>Mark Evans was voted Marketer of the Year by Members of The Forum for his leadership and achievements as the Marketing Director of Direct Line Group. Over an early evening drink, we invite Mark to share some of the highlights of his career to date, his passion for financial services marketing and some of the important lessons he has learned along the way. Speakers: Lawrence Gosling, Managing Editor, Incisive Media; Mark Evans, Group Marketing Director, Direct Line</p>



## The Financial Services Forum

**The Financial Services Forum is a membership organisation which exists to provide an independent, stimulating environment to help the community improve their individual and corporate marketing effectiveness.**

It's a community where you can meet like-minded individuals to build your professional network, debate strategic marketing issues and engage with thought-provoking content.

Through a calendar of over 60 events each year, the community has grown to include over 900 Members, representing companies large and small, across all sectors of the industry.

But we're much more than just an events business. Argent, our journal, provides regular articles, interviews and discussion in print and App formats.

And over recent months, The Forum community has grown significantly following the introduction of Online Members who can communicate, debate, study and exhibit good financial services practice, at a time and location convenient to you.

The website also includes a significant Knowledge Centre of presentations, articles, white papers and research material.

The purpose of The Forum remains the same across all our channels – to generate debate and provide insights that will help our Members improve their marketing effectiveness.

We continue to recognise that financial services is not a homogenous industry. To reflect its diversity we will maintain a focus on addressing the challenges specific to your sector and geographical region. Via Special Interest Groups and online communities we address consumer issues, but also B2B and institutional marketing topics too.

The Forum takes an independent and objective view on who should be a Member, present at our events or write for our publications. We aim to select the best speakers and authors, to provide a platform for thought leaders and expert practitioners. If you feel you should be a part of this growing community, we would be delighted to welcome you.

For further information and an application form please go online at [www.theforum.co.uk](http://www.theforum.co.uk) or call Jasmine Butler-Burnham on 020 3657 9899.

... topical events to discuss key issues and  
develop my marketing performance ...

**Peter Elliott, Head of Marketing Proposition L&G**



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**Simon Watts**, Brand Portfolio Strategy Director, Group Brands & Marketing, Lloyds Banking Group



## The Financial Services Forum

1st Floor, 251 Pentonville Road, London N1 9NG

020 7449 9000

[info@thefsforum.co.uk](mailto:info@thefsforum.co.uk)

[www.thefsforum.co.uk](http://www.thefsforum.co.uk)

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