



The Financial  
Services Forum

# Events

January–March

2017

Corporate partners

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# Welcome to our Calendar for January to March 2017

I'm pleased to welcome you to The Forum's latest events, seminars and conferences, through to the end of March 2017. Please take a few moments to look through and fix dates in your diary.

You will notice some key changes to previous Forum calendars.

As always, there is a variety of topics and discussions, covering the issues of greatest relevance to strategic financial services marketing.

In addition, to accommodate the growing number of Associate Members who have joined the community through Team and Corporate packages, we have focussed some additional attention on what we have described as "Core Marketing" sessions – events where delegates will receive both tactical and strategic knowledge to enhance their marketing careers.

The sector-specific events relevant to your current industry sector remain. Members attending these events can debate strategic thought-leadership as well as practical tips on marketing best practice.

Please note our new Fintech community event in March – the first of regular quarterly events looking at the sector. We hear from a panel of challenger Fintech businesses who are developing, what they believe, will be behaviour-changing products.

As always, please consider attending events outside of your current business sector. There are lessons to be learnt from other sectors of the industry and opportunities to create business relationships with new companies and individuals.

An additional key change is the introduction of webinar sessions. These live events will be available to access using The Forum's ongoing partnership with BrightTalk, allowing greater access for those based outside of the London area.

Please don't forget to visit our website for the latest event updates, as well as the fantastic resource offered via the Knowledge Centre.

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 2017 and discussing financial services marketing issues on our 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.

**W**

### Event is run as a live webinar session

To allow all Members greater access to live content, a number of Forum events will be held as webinar sessions. Webinars will be run via The Forum's BrightTALK channel, with standard opportunities for Q&A.

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)

Wednesday 11  
**Core Marketing:  
 Content**

**E A P W**

## Content and its Impact on Engagement and Brand Loyalty

Recent research into marketers' thoughts on the financial services marketing industry in 2020, found that dynamic content development was one of the most important issues they face. It's no surprise – increasingly, engagement with a brand is via content. So, understanding audience needs and business objectives to create a constant supply of customer-focussed content, will be a core skill in financial services marketing. In this webinar session, we consider how to create great content, allowing your brand to be framed as a thought-leader; how to measure its success; ensure repeat visitors; and deliver a frictionless experience.

Speaker: Mark Brayton, Director of Interactive Marketing, Barclays Bank

Thursday 12  
**General**

**E A P**

## Creating Digital Platforms for Customer Engagement

The rise in digital services has changed the way consumers engage with their financial services providers, and Fintech firms are finding innovative ways to deliver products and services that suit customers' lifestyles. But humans interact with computers differently to the way they interact with other humans – so the move from high street branches to online platforms requires new understanding of behavioural psychology. How can firms use digital tools to increase levels of trust in their brands? How can the 'tabloid' nature of online platforms improve customer decision making? And how can choice architecture increase website sales? The speakers will explore the latest behavioural economics insights and share best practice case studies of how doing digital well has improved profitability.

Speakers include Henry Stott & Nick Chater of DecTech

Tuesday 17  
**PBWM**

**E**

## Overcoming Technological Marketing Hurdles

As we move our promotional and transactional communications through digital channels, what are the issues for marketing? With fraud and cybercrime a major customer concern, a clear challenge exists for external customer engagement, as well as internal communications. It's not just trust in the brand, but trust in the technology. How can you move your marketing function to an operational footing that caters for your customers changing needs? And how can you do that in a safe, trustworthy and risk free manner, that satisfies your compliance and risk departments?

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Thursday 19  
**Asset  
 Management**

**E**

## Is the Tech Tail Wagging the Marketing Mutt?

With the rush towards Fintech and all things digital, is there a danger that traditional marketing skills and knowledge are being forgotten by asset management marketers? Already stretched marketing budgets are being swallowed by new tech costs – but to what end? We are swamped by big data, but are we counting everything while losing track of real marketing effectiveness? Are clients being engaged, or do we need to be reasserting the virtues of human interaction? Our experts give their views.

Speakers include Piers Morgan, Group Head of Brand at Aberdeen Asset Management and Rupert Hodson, Co Founder and Chief Revenue Officer at Dianomi.

Tuesday 24  
**Core Marketing:  
 Digital**

**E A P**

## Are You Being Digitally Served?

We've seen a transformation in digital marketing, as consumers spend more time on mobiles, tablets and laptops. Brands now connect with customers through a variety of digital channels including social media, display advertising and e-commerce. But are you getting a direct bang from your digital buck? Or are we sometimes led down a tech-path by companies with a vested interest? Does consumer targeting, retargeting, re re targeting result in good customer outcomes? What metrics can you put in place to ensure your digital budget is delivering marketing effectiveness? Is it even possible to put those in place and properly understand the 'dark digital' highlighted by Facebook's erroneous video metrics?

Speakers include: John Broughton, Head of Marketing, Confused.com

Wednesday 1  
Life and  
Pensions

E

## How are Platforms Changing Financial Services Marketing?

Platforms are an increasingly important feature of the financial services marketplace, whether fund supermarkets, workplace platforms, or those consolidating a wide-range of assets and products. How are platforms influencing marketing practice? Are product providers getting the balance right between traditional brand advertising and more targeted approaches?

Speakers include Heather Hopkins of Platform.

Wednesday 8  
Core Marketing:  
Development

E A P

## Tomorrow's Financial Service Marketing Function

If you are winding down the traditional marketing function, whilst ramping up the digital and data units, please be careful. Don't confuse what marketing is about with the tools, channels, and feedback loops to do it. What the industry needs is more upskilling of marketing professionals in digital, and not new digital and data silos. Join us to discuss some of the core skills and knowledge required for successful financial service marketing functions. Identify the key elements in your own marketing skills that will need to be enhanced as you plan your own marketing career. And help us create the themes and topics for future core-marketing events.

Tuesday 21  
Insurance

E

## Crisis Management Best Practice

The unexpected crisis will happen. So how well are you and your business set-up to deal with the unexpected, left-field disaster? Now more than ever, the financial services industry needs to incorporate crisis management best practices to protect an organisation's reputation and manage threats to the company's financial viability. What best-practice procedures should you consider for your own crisis management efforts? How do you structure your PR and communications to deal with the problems you cannot predict? How can you deploy your resources to minimise the brand damage and manage the situation to best effect? What is the business case for Social media?

Speakers include Claire Foster and Francis Browning of Direct Line Group

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**FWD**

Tuesday 28  
Core Marketing:  
Brand Strategy

E A P

## How to Develop a Powerful Verbal Identity

In financial services, it's commonplace to aim for a distinctive visual identity – but it's a different story when it comes to the way that organisations try to express themselves in writing. While many try to ensure that they use words clearly and accessibly, very few use writing in a way that expresses any real sense of differentiation. As a result, verbal identity remains one of the biggest unexplored areas for effective financial services brand development. In this practical session, our panel shows you how you can start to explore it.

Speakers include Sue Simpson of NS&I, Mark Scantlebury of Quiet Room, and Lucian Camp.

Thursday 2  
Fintech

E

## A Fintech World

What is happening in the Fintech world? Are we really in the middle of a revolution which will see business models change completely? Financial services have been colliding with technology since the earliest computers. However, the emergence of new technologies has led to claims of an exponential inflection point in the technological impact on the financial services sector. In this, the first of regular quarterly events looking at the Fintech sector, we hear from a panel of challenger Fintech businesses who are developing, what they believe, will be behaviour-changing products.

Wednesday 8  
Core Marketing:  
Innovation

E A P W

## The Future of Financial Services – Utility vs Meaning

Uber, Nike and their like, have turned branding on its head. They have created utilitarian global brands by inserting themselves into our daily lives using technology as their Trojan horse. And through this utility they have invested more meaning into their brands than any global advertising campaign ever could. Utilitarianism is the innovation frontier for financial services. How do traditional financial service companies reconfigure and transform their capabilities to innovate around their customers' needs and rebuild their brand meaning through utility, instead of advertising.

Speaker: Justin Small, The BIO Agency.

Tuesday 14  
Retail Banking

E

## More Disruption

With banks already facing disruption from Fintech and other challengers, the forthcoming implementation of the European PSD2 directive is set to herald a new wave of competition. Open banking offers consumers the prospect of tailored services and value improvements, but where does it leave the traditional banking model? Are there opportunities, as well as challenges, for the established players? How should banks rethink their customer relationships and revenue models? And will customers be comfortable with their data being shared?

Speakers include Simon Newstead of Vocalink and Alan Walsh of Bud.

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Thursday 16  
Mortgages

E

## London Mortgages Forum

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.

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Tuesday 21  
Core Marketing:  
Data

E A P

## Data Regulation

This core-marketing session will delve into the future of data in financial services marketing. In particular, we look at the General Data Protection Regulation. Intended to strengthen and unify data protection for individuals within the European Union, what impact will it have on financial services marketing? Is there a major conflict between the intention of the legislation and the constraints they will impose? What are the risks involved to commercial business goals? Will it simplify the regulatory environment for international business by unifying the regulation within the EU, or limit the potential for digital data gathering and application?

Speakers include Alan Sanderson, Head of Insurance at Sainsbury's Bank and Ian de Freitas, Partner at BLP Private Wealth.

Wednesday 22  
PBWM

E

## The Wealth Health Check

What is the current state of the HNW/UHNW markets? We look at a selection of key thought-leadership reports that consider the issues concerning affluent investors, billionaires, and family offices. We examine Investor Watch UK, showcasing insight into the HNW and affluent investors. We look at PwC research into the world of billionaires. And finally, examine the pressing issues related to the family office community, where 43% expect a generational transition within the next 10 years.

Speakers include Kirsten Burt of UBS Wealth Management and Aine Bryn of PwC

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Wednesday 29  
Annual  
Members'  
Conference

E A P

## The Inter-Generational Marketing Challenge

What should the financial services industry be doing to address the consumer of tomorrow? Technology is revolutionising our marketing communications and customer experience. The customer has more choice, better service and less time than ever before. It's a confusing, fast moving landscape that is highly segmented and differentiated. What strategies, products, and services will ensure your marketing is delivering the engaged customer of today and tomorrow?

Speakers include Patrick Barwise, London Business School, Thomas Barta, a former McKinsey Partner, Holly Mackay, Boring Money



## 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 1500 Members, representing companies large and small, across all sectors of the industry.

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**



## Chairman

**Keith Carby**, Chairman and Chief Executive Officer, Caerus Capital Group

## Members

**Robin Bulloch**, Managing Director, Lloyds Bank Retail, Lloyds Banking Group

**Annie Coleman**, Managing Director, Global Marketing Strategy, UBS Investment Bank

## Lord Flight

**Ken Hogg**, Head of PRA Compliance, Prudential plc

**Peter Markey**, Chief Marketing Officer, Post Office

**Jo Parker**, Chief Executive Officer, Chime Specialist & Teamspirit Group

**Anthony Thomson**, Founder, Metro Bank and Atom Bank. Chairman, The Financial Services Forum and National Skills Academy for Financial Services

**Patrick Waldron**, Chief Executive, Fintrax

## Asset Management

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**Jet Cooke**, Jet Cooke, Head of Marketing – End Investor, Fidelity International

**James Cardew**, Global Head of Marketing, Schroders

**Caroline Haley**, Director, First Quartile (Part of FWD)

**Anne-Marie McConnon**, Marketing Director, BNY Mellon Investment Management

**Scott Stevens**, Head of Business Development, Quilter Cheviot Investment Management

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**Annabel Venner**, Global Brand Director, Hiscox

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**Lisa McBreen**, Head of EMEA Marketing, Morgan Stanley

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**Heather Smith**, Digital Transformation Director, LV=

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**Sherdin Omar**, Principal Global Pricing Consultant, Liberty Mutual Insurance Europe Ltd.

**Sam Taylor**, Brands Director, Direct Line Group

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**David Cartwright**, Head of Insight & Consultancy (Wealth & Protection) Defaqto

**Tom McPhail**, Head of Pensions Research, Hargreaves Lansdown

**Victoria Wentworth**, Chief Customer & Strategy Officer, Wesleyan Assurance

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**Danyaal Hasan**, Executive Director, Head of Banking Products, Coultts

**Nicholas Millar**, Director, Strategy & Consumer Insight, Vocalink

**Lisa Wood**, Chief Marketing Officer, Atom Bank plc

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



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