The Financial Services Forum

Events

April-July

2017

Corporate partners

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Welcome to our Calendar for April to July 2017

Welcome to The Forum's latest calendar of events and seminars for the months April to July 2017.

Please take a few moments to look through the topics and discussions. I hope you can fix some dates in your diary and join us to discuss the key strategic issues facing financial services marketing.

You will find sector-specific events relevant to the unique challenges you face in your particular segment of the financial services industry. Members attending these events will debate strategic thought-leadership issues, as well as practical tips on marketing best practice.

To accommodate the growing number of Associate Members who have joined the community through Team and Corporate packages, we continue to focus more attention on "Core Marketing" sessions – events where delegates will receive both tactical and strategic knowledge to enhance their financial services marketing careers.

Our new Fintech community continues with an event in May. Like all sector-specific communities, the group will meet at regular quarterly sessions. This particular event will focus on Blockchain and how it will transform our industry.

We continue to offer a selection 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. Recent webinars can be viewed via the Knowledge Centre.

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.

The Forum's fantastic Knowledge Centre resource is always available to you. Recent webinars can be found in the online archive, as well as thought-leadership articles, white papers and research material. It's also the best way to get the latest event information.

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 an event soon and discussing financial services marketing issues on our website. 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.thefsforum.co.uk

Tuesday 4
Retail Banking

E

Customer Relevance in a Digital World: A New Age in Banking

The last two years have seen banks accelerate the delivery of value through digital solutions, although few pricing approaches have maintained the same pace. The importance of being 'relevant' to customers both from a value and price perspective has never been more important, especially in a world of increased transparency and open banking/APIs. We discuss how banks can develop digital solutions and pricing in a new age for UK and European retail, business and private banking: how to optimise customer journeys and decision-making processes; how to use behavioural psychology in pricing; and how to build smart digital and pricing strategies to drive customer loyalty. Speakers include Gianluca Corradi and Maximilian Biesenbach of Simon-Kucher & Partners; Bruno Genovese, formerly Head of Product at Tandem; Kevin Dearing, Head of Pricing at RBS.

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Strategy & Marketing Consultants

Wednesday 5
General

E A

Meet the Marketer

Sara Bennison was voted Marketer of the Year by Members of The Forum for her leadership and achievements as the Chief Marketing Officer of Nationwide Building Society. Over an early evening drink, we invite Sara to share some of the highlights of her career to date, her passion for financial services marketing and some of the important lessons she has learned along the way.

Speakers include Lawrence Gosling of Incisive Media and Sara Bennison, Chief Marketing Officer of Nationwide Building Society.

Tuesday 25
Core Marketing: Social Media

E A P

What Role Should Social Media Play in Your Strategy?

For some, social media is a road well-travelled. But – to continue the journey metaphor – has it ended in a single-track road or, even worse, a dead end? In this session, we take stock and learn from practical experiences of social media best practice in both the B2B and D2C sectors. How is social impacting on your business? We will consider the impact on your brand, customer engagement, content distribution, and product sales. Drawing from our speaker experience of financial services brands and lessons from retail brands that encompass financial services, this session will go beyond the what, to the why and how. Speakers include Nick Joy, Social Media Manager at LV=

Thursday 27
Asset Management

E

MiFID II: What Marketers Need to Know

With the Markets in Financial Instruments Directive (MiFID II) due to take effect from January 2018, what do asset management marketers need to know about the new rules? What should marketers be doing now to prepare for the directive's wide-ranging changes? We bring together a panel of regulatory experts to explain how MiFID II will impact distribution, inducements and hospitality, product design and more. What will the marketing challenges be and where are the opportunities? Speakers include Mark Colgate of Asset TV, Claire Bennison of Brooks MacDonald, and Simon Ellis of HSBC Global Asset Management.

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May 2017

Wednesday 3
Life & Pensions
E

Pension Freedoms: Are we Building Relationships with Clients?

Data suggests life companies are retaining more people at retirement, but is this just inertia? Do life companies really understand how clients behave in the years before they retire? For example, when do clients start to think about retirement and what action do they take? Do we understand client needs? Do we overwhelm them with too much of the wrong information in complex industry jargon? If we do, what's the right amount of information and how should it be provided? More and more people are buying retirement income products without advice, how can we make sure they're empowered to take sound decisions? We'll explore these issues, consider examples of best practice globally and deliver practical suggestions for change. Speakers include: Gregg McClymont, Aberdeen Asset Management (Chair); David Dunn, Making Sense of Retirement; John Lawson, Aviva; Jacqui Bateson, Skipton Building Society.

Thursday 4
Core Marketing: Effectiveness
E A P

Marketing Effectiveness Showcase

We invite a selection of winners from The Forum's 2016 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, including from Aviva, Direct Line and SunLife.

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Wednesday 10
Core Marketing: Advertising
E A P

How to Make a TV Advert on a Budget

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sky ADSMART

Have you have ever thought about advertising on TV but dismissed it as too expensive? Getting onto TV doesn't have to be expensive, time consuming and wasteful. Through technology, we are seeing an increasing number of first-time advertisers harnessing the medium that previously had considered themselves too niche, not right for TV, or lacking the necessary budgetary horsepower. But TV can now play an integral role in your direct advertising strategic planning. In this session we look at the practicalities of getting onto TV, from actually making an ad to targeting just your ideal viewer (and the smaller costs this entails).

Wednesday 17
Core Marketing: Content
E A P

Decluttering Content

A recent Havas survey revealed that 60 per cent of branded content is seen as clutter by its target audience. It was poor, irrelevant or failed to deliver. Add the ancient marketing truism that says half of every advertising budget is wasted, and the numbers just get worse. So, what's the solution for financial services marketers? Is it a question of retreating to quality – fewer articles but more definitive? Are we overthinking it and over-editing it? Do financial services marketing departments tend to make too many amends and changes, leaving articles bland and characterless? Or does compliance just make good writing and video difficult? Providing some answers will be Michael Pilgrim of Highbrook Media, George Webster of HP, and Andrew Oxlade of Schroders.

Tuesday 23
Insurance
E

The Sharing Economy and the Future of Insurance

The sharing economy is challenging insurance – how it is delivered, for how long, the kinds of cover needed, as well as the data collected. This presents huge opportunities for both the established brands and new disruptors. Online technology has enabled people to share assets, resources, time and skills more efficiently. By helping providers and consumers connect, new technologies help create value, streamline commerce, increase productivity, and make accessing markets and employment easier. Our session will examine emerging trends, new challenges and potential opportunities for the sector, and look at how insurers must understand and embrace consumer, technological, and social change. Speakers: Lord Wei of Shoreditch, Dan Kemp of Ninety and Iain Harper of InMyBag.

Thursday 25
Core Marketing: Communications
E A P

Asset Management Market Study and Corporate Communications

The FCA is expected to publish its final Asset Management Market Study in the first half of this year. The FCA looked at this sector to ensure that the market works better and investment products and charges offer consumers value for money. Interim findings, published in November, suggested the need for asset managers to be more explicit and proactive in their ongoing communications, to help investors consider whether to switch away from funds that persistently underperform. A panel of experts discuss lessons learnt following the study, the impact it will have on the asset management sector and the effect on the financial services industry as a whole.

June 2017

Thursday 8
Fintech
E A

Blockchain

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Teamspirit

Some are suggesting that Blockchain will transform the financial services industry – they may just be right. We are witnessing the move from potential into practical, with the implementation of technology becoming mainstream. It is predicted that blockchain will transform the digital relationship between brands and consumers, but what are the benefits to marketers and how will it create value? New product and innovation that benefits customer outcomes, experience and satisfaction will drive the marketing function. We examine how the technology will ultimately benefit the consumer, how marketers must stay ahead of this next wave of technology, and the possible benefits for existing providers. Speakers include: Mike Foster, Fujitsu (Chair); Anthony Macey, Barclays; Helen Disney, Unblocked.

Wednesday 14
Core Marketing: Brand Strategy
E A P

Brand Tracking – to Suit Your Budget

Don't fall into the misconception that only big brands, with the commensurate big budgets, can measure the strength of their brand. All marketing departments, whatever the overall size of their business or budgets, can measure and justify their spend on brand marketing. In this session, we look at the practical brand tracking issues you should consider for your business, whoever you are, and however large (or small) your marketing resources. What metrics do you need to put in place? How often? How do you use it internally? We hear from an established multinational brand, with sub brands operating in local geographic areas, and discuss how the principles for brand tracking remain the same for all organisations. Speakers: Charlie Gower, Group Head of Insight and Research, Hiscox Partner

Thursday 22
Private Banking & Wealth Management
E

Changing Role at the Front Office

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SalesKinetics

Compeer LIMITED

The Front Office is one of the most expensive departments of a wealth management firm, yet firms' performance across key business and client metrics in this area is very variable. In this roundtable breakfast session we share recent research from Compeer and IRESS on what a good (and not so good) Front Office looks like, in terms of organisation, productivity, client satisfaction and range of service. We will also consider the Front Office of the future and the changes needed to create a scalable and profitable wealth management firm that is also client centric.

Thursday 22

Awards entry deadline

Thursday 29
Core Marketing: Content
E A P W

Thought Leadership Marketing: Ten Pearls of Wisdom

Every financial services organisation has a unique take on the world. But most struggle to be heard. In this session we will share 10 Pearls of Wisdom on thought leadership marketing, helping organisations discover and give voice to ideas that change people's perspective on issues that matter. The webinar will explore: the naked truth about thought leadership, how you can build thought leadership winto your communications strategy and ten key elements every thought leadership marketing campaign should contain. The presentations will be run by Linstock Directors Jon Bennett and Keith Brookbank.

July 2017

Thursday 6
London Mortgages Forum
E

Mortgages Seminar

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Legal & General Surveying Services · PHOEBUS · Mortgage Brain · Rostrum · Target · MyHomeMove

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.

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.

Improve your financial services marketing effectiveness ...

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Chairman

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Sam Taylor, Head of Commercial Marketing, Direct Line Group

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Chairman

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

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Retail Banking

Steering Committee

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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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