



The Financial
Services Forum

Events

January–March

2018

Corporate partners

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Welcome to our Calendar for January to March 2018

I'm delighted to welcome you to The Forum's latest events, seminars and conferences, through to the end of March 2018. Please take a few moments to look through and fix dates in your diary.

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

The sector-specific events relevant to your current industry sector continue to delve into the unique issues they face.

And to reflect the growing number of Associate Members who have joined the community through Team and Corporate packages, we continue to increase the number of "Core Marketing" sessions – events where delegates will receive both tactical and strategic knowledge to enhance their marketing careers.

Members attending any event will debate strategic thought-leadership as well as practical tips on marketing best practice.

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 will continue to deliver a variety of event formats, including 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 2018 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

Wednesday 10
Core Marketing:
 Thought
 Leadership

E A P

Thought Leadership: What It Is and What It Should (Never) Be

Where product differentiation often borders on the impossible (particularly in some sectors such as Asset Management), thought leadership provides a medium for clear, insightful, thought-provoking content that clearly distinguishes you and your company. In fact, “thought leadership” is among the most inescapable – and misused – buzzwords in the industry. Yet used well, it remains a particularly effective tool for marketing in asset management. But before we address why and how, we ask: What is thought leadership? Why does it matter? And then consider: Top Tips for getting it right. Speakers include Neils Footman of CopyLab and Laura O’Connell, Managing Partner, Instinctif Partners and Rob Davies of Aviva Investors.

Friday 12
 Awards



ENTRY DEADLINE

Tuesday 16
 General

E A P

Is GDPR Good or Bad for Business?

It is not difficult to be critical of GDPR if one chooses to do so. Its complexity can be daunting and its effectiveness will be put to the test at every instance. Yet underneath its prescriptive text, there is a well-intended attempt to make it compatible with our digital future. Responsible businesses should not fear GDPR but learn to work with it and see it as a way of future-proofing its data practices. In this highly-topical session, we examine how GDPR should be good news for business customers. Personal data will be more secure, and the rate of spam marketing will fall. Can businesses investing resources to protect their clients’ interests look forward to competitive advantage? How can that be achieved? Speakers include Paul Winters of CACI, Paul Malyon of Experian, and Jonathan Harman, of Royal Mail.

Thursday 18
 Asset
 Management

E

Is Single-Strategy Fund Marketing Dead?

With the growth of multi-asset investment propositions and adviser firms outsourcing portfolio management, is there a future for single-strategy fund marketing? How should fund houses adapt to the rise of the wealth management sector? Should asset managers join the trend towards outcome-oriented investing – where funds are managed to a specific target – or move to a capabilities-based approach? Does brand become a more important part of the marketing mix for fund firms – or is it all about education? As the marketplace changes shape, our panel of experts consider the challenges and opportunities facing fund marketers. Speakers include Chris Chancellor, Partner, Mackay Williams and Graham Bentley, gbi2.

Tuesday 23
Core Marketing:
 Branding

E A P

An End to Naming Nightmares

Brand names matter most in the early stages, when you’re developing them and building awareness. After that, they’re largely taken for granted. But getting through those early stages can be tense and painful. All too often, projects that begin with optimism, a sensible timetable and a (fairly) clear process degenerate into a nerve-wracking race against time to come up with anything you can agree and register as a .com before the final deadline. But as our panel will discuss, it doesn’t have to be like that. Come along to this session and next time you tackle a naming challenge, you’ll find it’s a positive pleasure. Or almost. Speakers include Christian Turner, Global Director, Naming, at Siegel+Gale.

<p>Thursday 1 Life & Pensions</p> <p>E</p>	<h2>Pension Freedoms: Two Years In</h2> <p>Pension freedoms have been in place for almost two years – how are consumers taking to the greater flexibilities? Increasing numbers of people are engaging with pensions and the opportunities now available. But are consumers making good choices? Many people are accessing pension pots early only to sit in low-growth cash, rather than staying invested for longer. And too many are failing to take advice. With the final report from the FCA's Retirement Outcomes Review due shortly, we ask whether the industry is doing enough to inform and communicate with consumers. How can firms improve support for clients in making these important choices? Our expert panel debates the issues. Speakers include Gregg McClymont, Head of Retirement at Aberdeen Standard Investments and Matt Ward, Communications Director of AKG Financial Analytics.</p>
<p>Friday 2 Private Banking</p> <p>E</p>	<h2>Next Generation Appeal. Doing Well By Doing Good</h2> <p>Millennials are set to benefit from one of the largest wealth transfers that has ever been seen, and by 2020, the global millennial wealth could stand at USD 24trn (UBS, June 2017). Therefore, it is critical that financial institutions adjust to meet their needs. Global connectivity has increased our awareness of global problems, boosting millennials' interest in sustainability issues. 'The Millennial cohort is increasingly interested in doing good for the world while doing well. We explore the near-term developments in sustainable and impact investing, which appeal to Millennials and other emerging investor groups. Speakers include James Gifford, Senior Impact Investing Strategist at UBS and Jo Parker, Chief Executive Office, Chime Specialist & Teamspirit Group.</p> <p>Sponsored by</p>  
<p>Tuesday 6 Core Marketing: Effectiveness</p> <p>E A P</p>	<h2>Doing More With Less</h2> <p>More than ever, marketers are being asked to 'do more with less', with the same or even less money available to grow their sales. Entrepreneurs understand the importance of doing more with less, typically starting a company with limited money and time, to prove their concept. They often have to start small and find creative ways to deliver a bigger bang for their buck. This is something that Steven Mendel and Sam Gilbert of Bought By Many, Alex Cheadle of Ten Group, and Ruth Saunders, Advertising Planner on Confetti, are only too familiar with. In this session, they will share their real life insights on 'how to do more with less'.</p>
<p>Thursday 8 Core Marketing: Compliance</p> <p>E A</p>	<h2>Compliance at the Speed of Digital</h2> <p>How can financial services marketers balance the regulatory essentials of compliance, with today's turbo-charged, agile world of digital? Financial services marketers face many unique challenges. They are often tasked with promoting a wide-range of products and services, to a diverse demographic of prospects and customers, while dealing with some of the more stringent regulatory issues. It means that financial services marketers often struggle to leverage state-of-the-art marketing tools, while maintaining compliance regulations at the same time. In this session, we will provide key insights into how you, as a financial services marketer, can manage compliance at the speed of digital. Places are limited at this breakfast session.</p> <p>Sponsored by</p> 
<p>Tuesday 20 Insurance</p> <p>E</p>	<h2>The Connected Home</h2> <p>In an age of unprecedented uncertainty and technological innovation, how will the way you relax, cook, sleep, raise a family or throw a party change in the future? What will the home of 2020 look, sound, smell, and feel like? How can marketers use a new generation of technology to engage consumers in the connected home? For this morning session, we have partnered with Unruly, who have built an actual home of the future and will give us a guided tour of the premises. We will then hear from two industry experts on what that means for marketers with a particular focus on the insurance sector. Speakers: include Simon Gosling, Futurist at Unruly and Jenny Trueman, Head of Connected Home & Product Innovation at Direct Line Group.</p>

Thursday 22
Fintech

E A

Fintech and the Workplace

How is technology bridging the responsibility gap and driving greater engagement? With the shift in responsibility from Government to individuals and ergo employers in terms of responsibility for pensions and savings, how are fintechs bridging the gap and powering new ways of employee engagement? With insights from consumer champions, global benefits providers, and human resource specialists, we explore the dynamic changes to greater employee engagement from technological platforms, to real-time products, benefits and communications. Join us to debate how workplace-focused providers are helping employers shape themselves around employees' health and wealth needs in order to enhance ambition and productivity. Speakers include Andrew Evans, Founder and CEO of Smart Pensions and Samantha Seaton, Chief Executive Officer of Moneyhub.

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Wednesday 28
Mortgages

E

Building and Funding the Homes the Country Needs

The Autumn Budget 2017 announced a comprehensive package of new reforms to increase housing supply. The package includes over £15 billion of additional financial support for house building over the next five years, and planning reforms to ensure more land is available for housing. How does this policy impact on the lenders? What are they expected to deliver and what is the likelihood of this being achieved? In this highly-topical session we bring together policy experts, lenders and specialist brokers to discuss the impact of the biggest new home building initiative for decades. Chairman: Stephen Smith, Director, Housing Strategy, Legal & General.

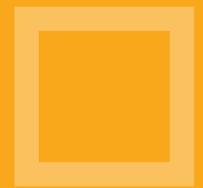
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Wednesday 28
Awards

THE FINANCIAL SERVICES FORUM AWARDS FOR MARKETING EFFECTIVENESS 2018 Opening February 2018

Register your interest to receive your entry pack: www.thefsforum.co.uk/awards



ENTRY DEADLINE: 21 JUNE 2018

Improve your financial services
marketing effectiveness ...

Contact:

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www.thefsforum.co.uk

<p>Thursday 1 Core Marketing: Thought Leadership E A P W</p>	<h2>Content Marketing to Drive Sales: Lessons From the Leaders</h2> <p>This session will start with a canter through the survey results of 150 senior client-facing personnel in financial services, professional services and technology firms. We will examine the content marketing strategies of the small minority of firms that are measurably better than others. How does this influential cohort plan, create, distribute and measure their thought leadership, pointing out specifically what these leaders do differently? We will then look at how this works in practice, showcasing examples of impressive and innovative work which is seen as the benchmark for many in professional services. The results reveal a lot about how financial services firms should be structuring their marketing efforts to best suit their sales teams. Speakers include Andy Rogerson of Grist and Suzanne Snowden, recently Global Director of thought leadership at PwC.</p>	
<p>Tuesday 6 Core Marketing: Innovation E A P</p>	<h2>The New User Interface – Developing Your Voice</h2> <p>Conversational interfaces such as chatbots and voice assistants are a topic of conversation at boardroom level, with 80% of financial institutions viewing them as an opportunity (Phonetics, Jan 2017). While the innovation itself seems to create a brand differentiator, with an increasing number coming onto the market, how can you craft your bot to genuinely personify your brand? And how many assistants, voices, and bots will customers really want in their lives? Speakers include Jason Maude, Starling Bank; Noel Lyons, Director of Digital Design at Barclays; and Matt Rowe, Creative Strategy Director, at The Foundry – Time Inc.</p>	
<p>Thursday 8 Retail Banking E</p>	<h2>Rising Interest Rates: How Will Customer Behaviour Change?</h2> <p>How will consumer behaviour change following the recent interest rate rise and what should marketers' priorities be in a world where they continue to increase? At what point will rate increments make a difference? With millions of savers and borrowers having experienced only rock-bottom rates, will there be an upsurge in competition in the cash savings market and a rise in debt problems? Will high-interest current accounts lose their appeal for consumers and providers? We bring together an expert panel to discuss how the environment will change for savers, borrowers and marketers. Speakers include James Daley of Fairer Finance and Greg Davies of Centapse.</p>	<p>Sponsored by</p> 
<p>Tuesday 13 General E A P</p>	<h2>Women in Marketing</h2> <p>The recent announcement that Virgin Money will create an all-women board shouldn't actually be news. After all, all-male boards do not make the headlines. Whilst it's obviously to be applauded, it's interesting that it's unusual enough for it to be newsworthy. Whilst women are well-represented in financial services marketing, what about the step up from middle ranking jobs to running P&L and getting on the board? There are many who have successfully made the journey, but still an acceptance that we have a long way to go in financial services. How can today's young female professional get the credit they deserve and become tomorrow's leaders? And how do businesses need to change to truly attract female talent? In this session, we hear from an experienced, diversified panel on how things can and should change today, for the benefit of tomorrow. Speakers include Kirsty Maxwell, Joint CEO of Teamspirit.</p>	
<p>Wednesday 27 General E A P</p>	<h2>Annual Members' Conference: The Future of Financial Services</h2> <p>Artificial Intelligence is an increasingly integral part of many industries, including marketing. Machine learning is driving forward much of the marketing developments in the retail sectors, with much of it being adopted in financial services. Using information from diverse datasets is a common use of AI which allows brands to surface and refine recommendations. How is AI being used in search engines, fraud prevention, social media, ad targeting, speech recognition, customer segmentation, content generation and chatbots? Financial services has its own particular challenges but AI is being evolving and adopted at a rate that means it's imperative marketers understand the opportunities and integrate them into their strategic mapping. Speakers include Orlando Machado, Global Analytics and Data Science Director, Partner, Aviva Quantum and Ms Hanne Tuomisto-inch, Senior Industry Head, Finance, Google.</p>	

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