The Financial Services Forum

Events

April–July

2018

Corporate partners

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Welcome to our Calendar for April to July 2018

Please find enclosed details of The Financial Services Forum's events, seminars and conferences, through to the end of July 2018. I hope you can 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 strategic issues you face. All are created to improve your knowledge of industry change and the impact it will have on the sector and its consumers.

And to improve your knowledge of marketing best practice, we continue to deliver "Core Marketing" sessions – events where delegates will receive both tactical and strategic knowledge to enhance your financial services marketing career.

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 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.thefsforum.co.uk

Tuesday 17
Asset Management
E

What Can We Learn From Millennials?

Little money (until they inherit) and expensive to acquire - why should we bother with millennials? Aside from their potential as clients of the future, understanding the millennial market may also provide useful lessons for marketing to our core customers. Digital communication and access; speed of response; consumer-friendly language; a desire to "do well by doing good" – much of what millennials appear to want could also be appealing for traditional investors. Our expert panel considers what the millennial market could teach the asset management industry. Speakers include Kim Bell, Founding Partner of BDifferent, Richard Watts, Head of Digital at Kurtosys and Scott Gallacher, Chief Commercial Officer at Moneyfarm.

Thursday 19
Retail Banking
E

Commercial Excellence and Customer Satisfaction in Banking

In an era where banks will have to compete to retain front-facing customer relationships, innovative strategies for enhancing customer loyalty and reducing churn must be employed. Join our experts as they present industry insights and discuss pragmatic strategies for maximising revenues in a rapidly changing landscape. Understand how different facets of financial services (retail banking, corporate banking, private & wealth management, fintech) can maximise their revenues given increasing competition due to regulatory changes such as PSD II and Open Banking; Evaluate using established behavioural practices to strengthen customer loyalty; Get a global perspective on the interaction of fintechs and banks in a rapidly evolving regulatory landscape; Learn how wealth managers and private bankers can minimise customer attrition through data analytics.

Sponsored by SIMON • KUCHER & PARTNERS Strategy & Marketing Consultants

Tuesday 24
Fintech
E A P

Fintechs and Advice

Fintechs and the advice marketplace: democratisation vs exclusivity? Now that the robots have arrived, our panel will explore fintech's impact on the advisory marketplace, the changing appetite for advice and where the marketplace is heading. By looking across the sectors, from pensions to asset management and mortgage providers, we will shine a light on the changes that have empowered consumer self-direction, reduced reliance on advice and provided opportunity to access hitherto inaccessible information. Will the marketplace continue towards democratisation of advice and in what form, or is it leading to more tailored, premium insight? Speakers include Jason Chapman of Willis Owen.

Sponsored by Teamspirit

Wednesday 25
General
E A

Meet the Marketer of The Year

Mark Brayton was voted Marketer of the Year by Members of The Forum for his leadership and achievements as Marketing Director of Barclays Bank. 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. Interviewing Mark will be Julian Marr, Editor, Professional Adviser and Multi-Asset Review.

May 2018

Tuesday 1
Core Marketing: Effectiveness

E A P

Marketing Effectiveness Awards Showcase

Sponsored by Opinium, Phoebus, Sapient Razorfish

We invite winners from The Forum's 2017 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. Whether you're entering our 2018 Awards and are interested in good examples of successful entries, or just looking for inspiration for your own financial services marketing campaigns, this event will be of interest to you. We include case studies from SunLife, Police Mutual, Wesleyan, and Janus Henderson Investors.

Wednesday 9
Life & Pensions

E

Next Generation Pensions

How can the pensions industry engage the millennial generation? With housing costs and student debt squeezing their ability to save for the long term, what can we do to get younger workers more interested in pensions? How do we build on auto enrolment – is there employer support for the industry engaging through the workplace? Might millennials be especially responsive to 'impact investing' strategies? Does fintech have the solution for this digitally-savvy generation? Our expert panel considers how the pensions industry could improve engagement with millennials – including possible lessons from other financial services and consumer markets.

Tuesday 15
Core Marketing: Segmentation

E A P

Winning Over Women

As customers for financial services organisations, women are growing in numbers, importance and value and therefore a huge business opportunity. But they are also less engaged and confident than men in managing their money. As women move from everyday banking, through longer term saving and investing, their perception and experience is shaped by what is still a male-dominated environment. *Winning over Women* explores what more financial service providers could be doing to meet the needs of women and how to create value by understanding how, where and why women's attitudes and behaviours are different. Finding strategies that could help create greater engagement will ensure that both sides are ultimate winners. Speakers include Kim Scofield of Kantar.

Thursday 17
Insurance

E

Mobile First or Mobile Only?

As we witness a sharp shift in consumers accessing ecommerce sites via their mobiles, we must ask what the implication is on the Insurance sector. Whilst we have seen the trend amongst millennials, is the older demographic now turning to their smart phone and tablet to buy online? And if so, is 2018 going to be the year where we must evolve our marketing strategy into mobile first – or even a mobile only? This presents a number of challenges to marketers and their strategic thinking. With dual-screening increasing, a web and a mobile customer might be the same person, so what impact does this have on marketing performance and how do you even go about measuring it?

Thursday 24
General

E A P

Product & Service Innovation Awards Dinner

Sponsored by Opinium, MESH The Experience Agency

Most customers are not interested in technology for technology's sake – nor are we. The Financial Services Forum's new Awards for Product & Service Innovation were introduced to celebrate new projects that improve the sector, and ultimately, benefit the consumer. They also highlight those innovations that have achieved or exceeded objectives and goals. The entries have been received. The judging has taken place. We now turn our attention to celebrating some of the fantastic initiatives being introduced by the financial services industry. At this Dinner we present the Awards. The evening will open with a drinks reception; include a keynote speech from an industry leader; provide a three-course dinner with musical entertainment; and conclude with the presentation ceremony.

Tuesday 5
Brand Strategy

E

How Many Ps in Brand?

We all agree that financial services brands are (largely, at least) experiential. So we must also agree that brand perceptions are shaped by all of the famous "Seven Ps" (not just Promotion, but also Product, Price, Place, People, Process and that slightly mysterious Physical Evidence). But here's the funny part: according to research among Forum members, we don't agree at all on the extent to which these seven areas should come under marketers' control. Does this mean we're trying to build brands with one hand tied behind our backs? Brand Strategy Group Chair Lucian Camp, will present the research findings, and lead a round-table discussion among a very senior group, on the implications.

Thursday 7
Core Marketing:
Innovation

E A P

Idea Economics

In the World Economic Forum report *The Future of Jobs* published in 2016, it was predicted that by 2020, the three most important individual skills for workers will be complex problem solving, critical thinking, and creativity. To quote from the report, "Change won't wait for us: business leaders, educators and governments all need to be proactive in up-skilling and retraining people so everyone can benefit from the 'Fourth Industrial Revolution'". Business often seems to be obsessed by money and process. Yet all change, growth and progress come from people and their ideas. Ideas are the world's most valuable commodity. Ideas are essential for identifying and realising opportunities and solving problems. Ideas are the source of innovation and invention. Ideas are what we rely on to communicate, to persuade, and to influence behaviour. Ability with ideas will increasingly become the crucial ingredient in personal success as well as corporately. Everyone wants to realise their full potential, and David Wethey, the author of *The Very Idea*! will talk through how companies can liberate their people to play a more creative role.

Wednesday 13
Core Marketing:
Communications

E A P

The Communication Revolution

Fake news, AI, Levenson, Cambridge Analytica, Trump, #MeToo – marketing professionals are facing a communications revolution, with the intersection of technology, society and regulation transforming the way companies engage with and talk to audiences. In this highly-topical session, we will look at the major secular trends impacting financial services communications and what these mean for financial services marketers. What do companies need to do to respond to this evolving challenge, and how should they transform their communications strategies, implementation and processes to take advantage of this new paradigm? Charles Ansdell of Redleaf Communications will lead a panel of expert speakers.

Thursday 21
Private Banking & Wealth Management

E

Generating New Business via Brand Differentiation

Sponsored by

Compeer Limited

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A look at branding in the PBWM sector. How can businesses differentiate themselves from competitors that offer similar products and services? Not just challenger brands offering new business models and technology, but the traditional players with an historic brand DNA. For those working in the sector, there are clear distinctions between brands – but are these lost on the consumer? One of the biggest challenges for marketers is making sure that potential customers see and understand the difference between their own company's products and services and stand out from the competition. This session will offer insights gathered from research into how consumers decide which service provider to use and how agencies can help brands articulate differentiation.

Tuesday 26 **Core Marketing:** Segmentation E A P	**Targeting the Future Customer** Advertising your band to the customer of tomorrow will be shaped by their media consumption. Predictions of the death of print are, to mis-quote Mark Twain, 'greatly exaggerated'. But forecasts for the amount of time spent with traditional media such as TV, radio and newspapers indicate that the future is very much digital and increasingly, mobile. The picture is confusing with each medium talking up their own future. In this session we clarify the situation and provide insights into what channels the customer of tomorrow will favour. Speakers include Lindsey Clay of ThinkBox and Rachel Aldighieri, Managing Director of DMA.
Wednesday 27 **Core Marketing:** Content Strategies E A P W	**Delivering Long-Term Content Strategies** Content. Still everywhere. Still the closest thing we've got to a customer engagement silver bullet. But here's an inconvenient truth: financial services organisations are still not using content as effectively as they could. Most marketing departments' content strategy is not aligned with the longer-term strategic plan. As competition for the customers' attention intensifies, meaningful engagement through a long-term content strategy is where enlightened FS firms are heading. Overcoming siloed structures and reward structures that focus on short-term ROI wins is a huge challenge. But if financial services firms are to harness the strength of content, to build long-term meaningful relationships in a journey that's becoming increasingly non-linear, these challenges have to be overcome. We will tackle legacy marketing attitudes which are driving misuse of content and consider strategies for long term business benefit.
Thursday 5 **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. Sponsored by
Wednesday 11 **Retail Banking** E	**Rebooting the Cash Savings Market** Sponsored by With interest rates on the rise but still historically low, where is the cash savings market heading? Will platforms like Hargreaves Lansdown's new Active Savings service shake up the traditional landscape of banks and building societies? Will open banking and artificial intelligence gain traction? And what's the future for Cash Isas, given the Personal Savings Allowance and interest paid gross of tax? Is the real competition from P2P or stock market investment products – and are customers being properly educated about the risks and opportunities? Our expert panel navigates the changing marketplace for cash savings. Speakers include Richard Owen, Chief Marketing Officer at Raisin.

Improve your financial services marketing effectiveness ...

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