The Financial Services Forum

Events

January–March

2019

Corporate partners

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Welcome to our calendar for January to March 2019

I'm delighted to welcome you to The Forum's latest events, seminars and conferences, through to the end of March 2019. 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 continue to delve into the unique issues they face. "Core Marketing" and "General" sessions provide delegates with 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.

Attendance at our events entitles you to credit time towards CPD. Should you need to evidence your commitment to learning, we include a section in all post-event surveys to request a certificate.

Please keep an eye on our website for additional 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.

While you are online take a look at the fantastic resource offered via the Knowledge Centre – a unique and searchable library of insightful and relevant content.

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 in person at an event in the first quarter.

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.thefsforum.co.uk

January 2019

Thursday 17
Life & Pensions
E

Robo-Advice: What are the Limitations?

Robo-advice is expanding from the investment space into pensions and financial planning. But what are its limitations? To what extent will consumers engage with automated advice solutions – will they continue to want some human interaction, particularly for more complex, individualised planning? What's the future for robo-pension, robo-protection and holistic robo-advice services – how could they impact the marketplace? And with automated advice talked about as a solution to the advice gap, what are the regulatory challenges? As robo-advice becomes a financial services reality, our expert panel looks at the latest developments and considers how far it could go. Speakers include: Alastair Black, Head of Financial Planning Propositions, UK Propositions, Standard Life Aberdeen; Georgina Clarke, Director, IFF Research; Mark Grimes, Executive Director, EValue and David Dunn, Director, Making Sense of Retirement (Chairperson).

Tuesday 22
Retail Banking
E

Making a Success of Subscription Services

Sponsored by PHOEBUS

Amazon and Netflix have shown that subscription services can be a hit with consumers. How can banks emulate this success with fee-charging current accounts – how do we get customers to buy a banking subscription? Is it all about account benefits and rewards: can we be more creative and improve the value-add? Where are we going wrong – is the language of "subscription", "upgrade" and "membership" more engaging for today's consumers? Do the service offerings of fintech challengers provide any pointers? Our expert panel looks at what we can learn from subscription models elsewhere and how to apply those lessons to banking services. Speakers include: Alex Whittaker, Digital Lead Europe, Prophet.

Thursday 24
General
E A P

"Take, Make, Waste" Doesn't Work: The Move To A Circular Economy

The circular economy provides one of the few resilient models for economic growth – but poses questions about how our financial system will finance these new business models. The way we consume resources has huge implications for future generations. Circular economic models offer a restorative and regenerative approach, aiming to prevent depletion and focus on reduce, reuse and recycle. Earlier this year ABN AMRO, ING and Rabobank launched circular economy finance guidelines to encourage the financial community to contribute, and a recent ING Group report explained how the model could grow a sustainable business portfolio and change the financial landscape with its environmental and commercial benefits. It's clear that moving from linear to circular offers significant opportunities for financial institutions. In this session, we'll look at how to make the most of these business opportunities, and the impact on finance services and banking activities. Speakers include: Gary Lapthorne, Head of Responsible Business, Lloyds Bank and Nick Liddell, Director of Consulting, The Clearing.

The growing importance of innovation in financial services today, and its vital role in engaging with and empowering customers in the future, prompted us to launch the Awards for Product & Service Innovation in 2018 – recognising innovation in financial services that delivers tangible benefits to both consumer and provider. To request entry material please email Richard Nolan: rn@thefsforum.co.uk.

Entry deadline 18 January 2019

2019 Awards for
Product and Service Innovation

January 2019

Tuesday 29
Fintech
E

Lessons from Fintechs: Ethics as a Key Business Driver

Sponsored by Teamspirit

Fintechs continue their challenge to the status quo with great ideas harnessing the latest tech to deliver original new products to the market. They also understand a new shiny product is not enough. So, brands are positioning themselves as responsible businesses aware of the demands of their customers to behave responsibly and deliver ethical products. A year on since Larry Fink, CEO of Blackrock, called on global business to make a positive contribution to society, this event will explore the extent to which ethics and responsible business is now a key business driver for fintechs. From challenger banks introducing gambling blocker features, to a new breed of data led asset managers that assess performance and sustainability, we will examine the motivations and expectations of users and investors that is taking ethics in finance mainstream. The panel will discuss how fintechs are leading the way in responding to their customer base. They will argue that 'good' business is not just good business sense, but a business necessity that established players cannot ignore. Speakers include: James Lawson, Co-Founder and Partner, Tribe Impact Capital and Ciaran McCale, Head of Media and Communication, Arabesque.

Wednesday 30
General
E A P

The Experience Gap

The promises brands make and the experiences they deliver has never been more important to customers in an age characterised by ease of access, choice, speed and convenience. However, Financial Services brands are often accused of delivering poor customer experiences. How much is that gap costing your brand? The latest data proves that there are some FS brands doing a great job of keeping their marketing promises. Our expert panel of senior marketers from a selection of brands discuss the importance of closing the Experience Gap, the key things brands need to focus on to do so and their plans to continue improving the alignment between their marketing promises and brand experiences in 2019. Speakers include: Damian Symons, CEO of CLEAR M&C Saatchi; Michael Sherwood, Head of Customer Experience, Atom Bank and James Daley, Managing Director, Fairer Finance.

February 2019

Tuesday 5
General
E A P

Out With the New, In With the Old: The Ageing Population as a Driver for Change

Endless talk of disruption and digitisation can give the impression of a financial services sector obsessed with the 'new'. But while millennials and their post-2008 world view are often portrayed as a primary driver for change, are businesses and brand communications showing sufficient care and attention to their elders? Older consumers are not just the fastest growing segment of the UK population; research suggests they also have the greatest distrust and cynicism about financial services and the weakest sense of loyalty. While many baby boomers imagine an online-only future for the sector, barely one in ten say the communications they receive from firms make them feel confident in their financial decisions, compared to one in five 18-37-year-olds. We dig beneath the generational stereotypes and consider how financial services businesses can communicate better with consumers who don't want to be defined by their age, but whose attitudes have been fundamentally shaped by years of boom and bust accompanied by bold – and sometimes broken – brand promises.

Thursday 7
Insurance
E

Open Data and Open Banking – Where Next?

Open Banking is the start of something significantly larger and more transformational than many first thought. Already, it is touching other verticals, like mortgages, pensions and utilities. With the increase in TPP (Third Party Providers) applying to become AISPs (Account Initiation Service Providers), aggregation is likely to intensify in other areas. Is that the right track or are customers more comfortable viewing their accounts via their incumbent bank, where their salaries are paid? In this session we look at how Open Banking will develop into other verticals – those that recognise the opportunities in being part of the eco-system: Insurance – which now actively suggests you get quotes from other providers if you have been with the same provider for more than 4 years; and pensions, where the introduction of the pensions dashboard (which we are part of) will utilise open banking data. This session will explore the potential of the open data market for existing and incumbent providers. Speakers include: Clare Reilly, Head of Corporate Development, PensionBee.

February 2019

Tuesday 12
General

E A P

GDPR: Now the Dust has Settled

Businesses have now adopted and embraced the legalities of GDPR and are now moving towards future thinking and opportunities. Has GDPR improved the prospects for direct marketing by cutting out the spam and delivering targeted, relevant messaging to the right person at the right time There are some horror stories around the charity sector but what has been the real impact in Financial Services? What areas have benefited from the application of the legislation and as marketing understanding improves? What areas are likely to see the most benefit? What does post GDPR marketing best practice look like? Speakers include: John Watson, Chairman and Group CEO, WPN Chameleon and Scott Logie, Customer Engagement Director, REaD Group.

Thursday 14
Private Banking & Wealth Management

E

Top 10 Tips: Marketing to Make a Difference for your Front Office

PBWM companies rely on the front office to cross-sell and up-sell, but marketing is an essential and integral part of the business. How can marketing establish an effective, coherent relationship with the front office, to enhance continued business growth? How do you maximise your strategic marketing function to support the business growth process? How can you enhance and exploit the resources you currently have at your fingertips, to deliver greater success? This session will bring together experienced Heads of Front Office / Private Clients and a senior Head of Marketing to come up with 10 practical tips for attendees to take away to get the best out of their relationship with their Front Office.

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March 2019

Tuesday 5
Mortgages

E

London Mortgages Forum

How Robust is UK Lending? Declining consumer confidence in the UK has resulted in a sharp drop in mortgage lending. The health of the UK's finances is inextricably linked to the housing market. With that in mind, we ask 'how robust is UK lending?' Is the market in terminal decline? Two experts from very different backgrounds will give their views on a range of topics including: Brexit impact, interest rates, inflation, funding, liquidity, risk tribulations, the real impact of the lost generation. We will speculate on winners, losers and non-runners. Speakers include: Jonathan Tyce, Senior Banks Analyst, Bloomberg Intelligence, Bloomberg and Tony Ward, CEO, Home Funding.

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Thursday 7
Asset Management

E

Getting Through to the C-Suite

How do we get ahead, as senior marketers in asset management firms? How do we prove the value of marketing – and our own worth – to the corporate leadership? In the face of ongoing cost pressures in the sector, how do we protect and grow marketing budgets? Crucially, can we speak the language of the board? And with C-suites more likely to be inhabited by fund managers and finance professionals, what does it take for a marketer to get there? Can we break through the corporate ceiling? In a director-level breakfast meeting, we look at how to survive and thrive in the world of senior management. Speakers include: Vincent Hooplot, Managing Director, Hooplot Associates and Henrietta Jowitt, Deputy Director General – Commercial, The Confederation of British Industry.

Sponsored by

March 2019

Tuesday 12
Core, Brand Strategy
E A P

Does your Brand have a Purpose?

Inspired by some great case studies, marketers have become increasingly excited about the need to define and maintain a high-level corporate purpose. But in a field where authenticity is all-important, others say this is a game few brands can successfully play. Our expert panel tackles both sides of the argument.

Thursday 14
Core, Digital & Direct Marketing
E A P

Navigating the hype of Artificial Intelligence and Machine Learning

How do we use AI and ML to target, acquire and retain your highest value customers? We are on the brink of an age where AI-enabled smart machines – fuelled by advances in hardware, deep neural networks and enabled by unprecedented volumes of data - will think, act and even make decisions much the way a human would. While today's oceans of information can often feel overwhelming, it can also be harnessed for business advantage. How can clients exploit the economics of data through actionable insights that enable deep customer understanding to help run a profitable, more cost-effective business? Speakers include:Simon Cox, Strategy Director, Publicis.Sapient.

Tuesday 19
General
E A P

Marketing Effectiveness Awards Showcase

What makes your entry a winner? In the wake of the Marketing Effectiveness Awards 2018, some of the winners will present a case study on their successful entry. A great opportunity to learn more about some very interesting campaigns/products and about how to create an outstanding entry for the 2019 Awards.

2018 Awards for
Marketing Effectiveness

Thursday 21
Corporate Communications
E A P

Where Does Financial Services Need to Try Harder: Meeting the Needs of the Under 30s, or the Over 70s?

Has the financial services industry really managed to reach and engage millennials? Has it forgotten the over 70s? We bring together a panel of commentators to discuss the need for financial services companies to better understand and empower key audiences. We will ask who is setting the agenda, what more needs to be done, and why techniques of neuroscience and behavioural economics aren't being more widely applied. Speakers include: Tony Langham, CEO, Lansons.

Wednesday 27
General
E A P

Spring Members' Conference: Short-Term vs Long-Term: Getting the Balance Right

Marketing Effectiveness is at the heart of how brands grow. Brand investment is a tool to drive commercial value. Taking a long-term view is highly topical in the light of Binet and Fields new instalment. But are they talking to deaf ears in the Financial Services sector? Who is listening and who is getting it right? What are the arguments that will help marketing planning deliver the right strategies for optimal short- and long-term profit? Our line-up of senior level strategic marketers will share their thinking on getting it right. Speakers include: Alastair Pegg, Marketing Director, The Co-operative Bank and Carl Bratton, Head of Marketing Effectiveness, Direct Line Group.

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