The Financial Services Forum

Events

April–July

2019

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Welcome to our calendar for April to July 2019

In March, ownership of The Financial Services Forum transferred to Incisive Media. This is the start of an exciting new chapter for The Forum and will mean we can introduce new services for our Members, adding even more value to your membership.

This won't impact on our highly-successful events programme, and our new schedule promises to be as relevant and insightful as ever. There are sector-specific hot topics, as well as core marketing events such as Maximising Your Return on SEO and SEM, an Introduction to Virtual and Augmented Reality and Winning over Wealth, which will look at the reasons why women are, in general, less engaged with investing.

Please do book yourself in for as many events as you can and look out for our webinars as well. It's the best investment you can make in your marketing and sector knowledge, as well as keeping up-to-date with future trends. You're welcome to come along to events that are not directly related to your sector, as there are always things we can learn from other areas of the industry.

One of the highlights of this calendar is our Product and Service Innovation Awards Dinner, which will be held at The Museum of London on Thursday 23 May. You don't need to be shortlisted for an award to come along. It promises to be a fun evening, and a great networking opportunity. The evening will open with a drink's reception and canapés, followed by a three-course dinner and the Awards ceremony. Guests will then have the chance to celebrate at the after-party with DJ and drinks.

And while we're on the subject of awards, don't forget to submit your entry to the prestigious Marketing Effectiveness Awards. Entries close on Friday, 21 June 2019. If you would like to enter, but don't have the resource to write the entry, please let us know.

I very much look forward to seeing you soon.

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

April 2019

Wednesday 03
Fintech

E

Rewriting the Marketing Rule Book in an Omnichannel World

Sponsored by Teamspirit

In this session we explore how fintechs are changing the marketing rule book. How can you build a brand, with limited budgets, in an omnichannel world? With the focus on product design and user experience, we ask how fintechs define the right omnichannel balance that delivers awareness, engagement and lead generation? Can you build a brand through only one channel? Are influencers a force for good or a risky strategy? What is the optimal mix and what do you measure? Panellists from challenger banks to pension and insurance providers will share how their different marketing strategies have adapted as their businesses formed partnerships, raised funds, and began to scale. Join us to hear from the market shakers and discuss the implications for wider financial services marketing. Speakers include: Neil Costello, Atom Bank; Jasper Martens; PensionBee; Claire LaRocca, WealthSimple; Grant Warnock, Nutmeg.

Wednesday 24
Life & Pensions

E

Improving Behaviour at Retirement

How can behavioural economics improve decision-making and advice at retirement? With growing interest in behavioural economics across financial services, we look at how lessons and insights from this area can be applied to pension decumulation. From better framing of retirement options to the countering of negative biases – kneejerk aversion to annuities, for example – how can we use behavioural thinking to deliver better customer outcomes? Our expert panel discusses the ‘nudges’ that could make for more effective communication as clients choose their financial path at retirement. Speakers include: Anthony Gore, Just; Adrian Boulding, Spire Platform Solutions; Dr Alex Chase, Oxford Risk.

Friday 26
Core Marketing

E A P

Marketing to the End Investor: Maximise your Return on SEO & SE Marketing

Existing and prospective clients are far less inclined to consult sales people for information than they once were. Instead, they prefer to look online for their financial information. According to a Gartner study, potential B2B customers are around two-thirds of their way through a purchasing process before they have any contact with a supplier. Reasons for this include a lack of brand-building and differentiation, as well as the growth of online trading platforms. As a result, asset managers increasingly have to gear their message to end-investors. But despite churning out vast volumes of content, asset managers fare badly in getting their blog posts, articles and white papers on the first page of Google results. Building websites in the correct way can have a big impact on SEO & SEM. This includes using the right CMS, site structure, speed of website, mobile responsiveness, page layout and semantic code. When it comes to content aimed at end-investors, we will look at what works and why. Speakers include: Jet Cooke, Fidelity International; Niels Footman, Copylab; Rich Watts, Kurtosys.

Thursday 2
General
E A P

Virtual Reality in Financial Services – A Practical Introduction

The Forum's recent member survey on marketing thinking and trends showed that brands continue to look for points of differentiation but are failing to embrace new technology, especially the areas of Augmented Reality (AR) and Virtual Reality (VR). The possibilities they hold for financial services are not understood and, as a result, are not being embraced. In this practical session we will experience real examples of how AR/VR is being adopted successfully in different sectors with successful outcomes. Speakers include Charles Ansdell of Newgate Communications and Andrew Hawken of Mesmerise.

Thursday 9
Digital & Direct Marketing
E A P

The CX Factor – Transformation Programmes

Businesses are waking up to the fact that transformation programmes aren't doing what they say on the tin. Why and what needs to change? The traditional CIO / IT-led change programme is missing the point and failing to deliver. Marketing needs to take the lead by putting the customer needs front and centre, to deliver the type of growth and efficiencies that the C-suite demands. To deliver real value (at pace) every area of the business (including marketing, digital, finance, and operations) needs to realise the value they can bring to delivering successful change programmes. Technology – whilst an extremely important component – is only one of many, with businesses often forgetting about people/skills capability, processes and the customer. In this session we consider the strategy that marketing teams need to adapt to deliver real change. Speakers include: Dominic Traynor, BNY Mellon; Marcus Oughton, Simplyhealth; David Bower, Sanlam.

Tuesday 14
Private Banking & Wealth Management
E

Sustainable and Impact Investing: Getting the Communication Right

Sponsored by Compeer Limited

How can Asset Managers, Banks and Wealth Managers talk to their clients and intermediaries about this increasingly popular investment trend? Sustainable investing can be complex, so how do we break it down to make it easy for consumers to understand how their investments can help make the world a better place? This session will explore best practice and ideas for marketers to get the communication right.

Thursday 16
Brand Strategy
E A P

State of Mind, State of Market: What Makes a Challenger Brand?

Marketers in larger, established FS companies, often lament complex processes and legacy IT systems that stand in the way of a more agile working environment, to keep up with smaller start-ups. To compete, companies try many different approaches, from reforming internal processes and structure to investing in start-ups. But what if being a challenger brand is about mindset, rather than structure? Our expert panel invites you to leave scepticism at the door, as they share their experiences of creating and maintaining a working culture that encourages new ideas and experimentation – keeping a challenger spirit even in a big organisation.

Thursday 23
General
E A P

Product & Service Innovation Awards Dinner

The Financial Services Forum will present the Product & Service Innovation Awards at an evening at the Museum of London. The event will include a drinks reception and canapés, followed by a three-course dinner and the Awards ceremony. After the Awards ceremony, guests will have the chance to celebrate at the after-party with DJ and drinks. This 'business formal' event provides a wonderful opportunity to meet Members, entertain colleagues or clients, and celebrate success in the Awards. They showcase new financial service initiatives and highlight your commitment to delivering long-term tangible benefits for your customers. Tables and places will be allocated on a first-come, first-served, basis. You do not need to be a Member of The Forum to attend or book a table.

Thursday 30
General
E A P W

Update on Fintech Numbers

An overview of recent fintech developments in the UK. There will be a focus on how fintech start-ups are progressing and performing, and how corporate investors are positioning themselves to benefit from the innovation that is emerging from the fintech ecosystem. With valuations of fintech start-ups relatively high, how are they arrived at, and what is currently happening with regards to valuation metrics?

June 2019

Tuesday 4
Retail Banking
E

Navigating the Banking Revolution

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Retail banking is experiencing a blizzard of change. Much of it involves technology: the growth of digital banking, the emerging use of artificial intelligence, the rise of fintech challengers, and competitive initiatives like open banking. What will decide the winners and losers in the marketplace? Will the drive of new entrants overwhelm the incumbents, or will traditional banks continue to hold sway? Will competition turn into collaboration and partnerships? Will consumers finally embrace switching or will customer inertia remain an insurmountable barrier to transformation of the market? Our panel of experts give their predictions and insights. Speakers include: David Smith, Global Futures and Foresight and Sarah Williams-Gardener, Starling Bank.

Thursday 6
Insurance
E

Insuring your Future

Amazon Protect is Amazon's first branded foray into insurance on its own platform in the UK. A year and a half after its UK launch, Amazon Protect is now offered in four additional markets. In a sector where there is still mistrust, Amazon is a brand loved by all. Able to leverage its unbeatable customer service, reputation for transparency and impeccable use of data to drive relevance, loyalty and cross sell. How should insurers be thinking about the ecosystem challenge (and opportunity) from platform owners like Amazon?

Tuesday 11
Core Marketing
E A P

Winning over Wealth

Why are women less engaged with investing than their male peers? A recent study 'Winning over Wealth' looks below the surface to identify some of the underlying issues and offers some suggestions for actions the industry might take to secure greater engagement. We will consider the impact of women's lower self-esteem, their complex web of rational and emotional concerns, and their different priorities. Our panel members will contribute their own experiences to what promises to be a lively discussion on a big issue for both the industry and society. Speakers include: Mark Deakin, Barclays; Vikki Leach, Kantar; Helen Campbell-Watt, Coutts; Tamara Gillan, Cherry Mortgage & Finance.

Thursday 20
Corporate Communications
E A P

Corporate Communications Event

We bring together a panel wof expert commentators to discuss the most topical and challenging issues facing corporate communications professionals.

Friday 21

Entry Deadline – thefsforum.co.uk/awards

2019 Awards for
Marketing Effectiveness

Tuesday 25
Core Marketing
E A P

The Value of Thought Leadership

We explore the growing importance of thought leadership as the marketing tool to reach a senior, and increasingly global, audience. The question is simple: How can you generate more value from your thought leadership? The answer is more complicated. We will look at the latest research into how senior executives view and use thought leadership. This in-depth study included 500 enterprise firms in the US, Europe and Asia. What thought leadership provides most value? What type of research methodology works best, formats and channels of choice, regional differences in preferences? Delegates will leave with practical detailed insights into growth opportunities and the challenges that hold them back.

Thursday 27
General
E A P

How to Organise your Business for Success

Financial service organisations are facing many challenges as they strive to become experience-driven businesses. Customers are becoming more and more demanding, expecting personalized, relevant and contextual messaging from the brands they love, but organisations are struggling to meet these new needs. Buying 'best in breed' technology is not the only solution needed! Based on recent research we will hear how financial services brands are organising for digital marketing success. How 'best in class' organisations are preparing for success, establishing new teams, structures and processes to ensure agility, speed and ROI.

July 2019

Tuesday 2
Asset Management

E

Asset Management: Fixing the Consumer Disconnect

Sponsored by publicis sapient

Are asset management marketers becoming disconnected from the end-consumers of investment products? The march of technology, as well as specialisation within marketing departments and distance from the sharp end of sales, mean maintaining that connection can be a challenge. Where is the voice of the customer in asset management firms? How should we capture it, and how do we get that voice heard at board level? Focus groups, advisory boards, client surveys – what's the best way to build a customer dialogue? Our speakers debate how firms and the industry can re-establish the consumer connection.

Thursday 4
Mortgages

E

Does the Wind Blow from the South?

In a screeching U-turn the recent Royal Commission report in Australia that recommended an end to lenders paying commission to mortgage lenders has been rejected. Whilst trail commission is definitely being removed, upfront commission is here to stay and possibly even increase. The reason for this U-turn is the significant number of unintended consequences that would kill off innovation and significantly reduce customer choice, with technology led brokers and lenders outside the top four massively affected. What might have happened if 'proc' fees had been abolished? What would happen if proc fees were abolished here? What are some of the other potentially disruptive regulatory or legislative activity that could be on its way? Speakers include: Robert Sinclair, AMI; Peter Brodnicki, Mortgage Advice Bureau; Roland McCormack, TSB Bank; Maria Harris, Atom Bank.

Sponsored by Mortgage Brain, PHOEBUS Seamless Software Solutions, Legal & General Surveying Services, Target, MyHomeMove

Argent

News and views from The Financial Services Forum

Look out for the Summer edition of *Argent* – packed full of insights, musings, and old favourites, such as Meet the Marketer and 60 Seconds.

If you would like to contribute, or you're interested in sponsoring an article, please contact Lynsay at lh@thefsforum.co.uk.

The next 60 Second debate topic will be coming to your inbox soon. Please take part – we love to know your thoughts.

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