



The Financial  
Services Forum

# Events

September–December

# 2019

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# Welcome to Our Calendar for September–December 2019

It's nearly six months since we moved into the Incisive Media offices and I'm pleased to say that we have settled in well to our new surroundings and work processes. New ownership with access to greater resources will allow us to develop The Forum in ways that will be of real benefit to our members. We are looking forward to introducing a number of new products next year that will enhance the member experience as we continue to strive to make individuals and organisations more effective in the fast changing world of financial services marketing.

Meanwhile our highly successful events programme continues, and our new schedule for the Autumn promises to be as relevant and insightful as ever, reflecting the hot topics that are front of mind for all FS marketers. Over the course of the next few months, in addition to our sector specific subjects, we will be looking at areas such as the increasing importance of Influencer Marketing, attracting the right talent for your brand and why voice search needs to be integrated at the heart of your content strategy.

Our 'Marketing Trends Survey' from earlier this year produced some fascinating insight into the current trends, challenges and issues FS marketers face. The findings underpin the content for our Autumn Members Conference on 6 November, when we pick up on some of the key themes that emerged and examine in more detail.

I very much hope to see you there, and at our other seminars and conferences.



**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](http://www.theforum.co.uk)

Tuesday 10

General

E A P W

## Webinar: Driving Efficiencies in Financial Services

### Leveraging Sales and Marketing Enablement to Drive Productivity, Effectiveness and Success

This webinar will feature top tips and practical takeaways aimed at helping drive business results across all types of FS organisations. The webinar will consider:

- How escalating client expectations, market pressure and demographic shifts have created a new era of demands
- The challenge of content in delivering value to clients
- The value of sales enablement platforms in meeting these challenges
- Which FinServ firms are reaping the rewards of embracing sales and marketing enablement

Speakers: Bill Finnegan, Managing Director Financial Services Marketing, Seismic

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Thursday 12

Brand Strategy

E A P

## The Influencer Ecosystem

Influencers have become an important part of the digital marketing landscape. Now, just as a number of financial brands are showing an interest, tough questions are being asked. Is influencer marketing ethical? Does it work? Does it make sense in a low-involvement category like financial? How can you deploy influencer-generated content to boost your brand advocacy and overcome lack of trust for FS brands? Come along to our introduction to the influencer ecosystem and find out.

Speakers: Scott Guthrie, Influencer Marketing Consultant; Jack Morel-Paulo, Head of Influencer Marketing Strategy, Analytica. *More speakers to be confirmed.* Chair: Lucian Camp, Brand and Marketing Consultant

Tuesday 17

General

E A P

## Is Your Brand Getting you the Talent you Deserve?

How does the best talent perceive different industries, and what are the potential barriers to entry into the financial services sector? How can embedding certain values and behaviours within the organisation better attract, engage and retain the innovators, the rainmakers, and the disruptors that might otherwise be gravitating towards other areas such as big tech or start-ups? We look at the role that brand/marketing plays in attracting or repelling the best and most diverse talent.

Speakers: Rana Brightman, Head of Strategy, EMEA, Siegel+Gale; Ben Osborne, Head of Insights, Siegel+Gale

Thursday 19

General

E A P

## Fixing the Broken Customer Journey with Digital Transformation

According to an IDG report 66% of buyers are desperate for more relevant content. Furthermore, research by The Content Marketing Institute reveals that 72% of marketers say their top challenge is producing more relevant content. This practical session will offer real world insights from client-side strategies, considering how marketers can:

- Create innovative experiences that resonate with the B2B buyers
- Empower sales with value-driven messaging in real time
- Analyse buyer behaviour and engagement through data-driven reporting

Speakers: Iain Masson, Director of Sales, Showpad. *More speakers to be confirmed.*

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Tuesday 24

Life & Pensions





E

## Improving the Pensions Journey for Women

The pensions savings deficit is particularly acute for women. Generally lower earnings than men and periods of unpaid caring often translate into poor pension outcomes. What can the industry do to improve the pensions journey for women? Are specific marketing approaches needed for women? How important is gender-based targeting compared with characteristics like the age and income level of clients? How should we tailor communications to boost engagement? Our panel of experts debates the issues around women's pensions and ways to address the savings shortfall.

Speakers: Jennifer Davy, Head, Independent Women; Helen O'Donovan, Head of DC Client Communications, Legal & General Investment Management; PLSA (speaker to be announced). *More speakers to be confirmed*

<p>Thursday 26 <b>Fintech</b></p> <p><b>E</b></p>	<p><b>Building Global Brands</b></p> <p>With the UK's stated fintech ambition to build on its European crown and to become a global fintech hub, this session will look at how the leading fintechs are building global brands. Hear from some of the European and global fintechs who have already successfully launched across multiple markets. With insights from payment providers to challenger banks and accountancy software providers, the panel will share their learning on how to deliver on a global mindset and eradicate borders. With record levels of funds being raised to help unicorns scale internationally, we ask what it really takes to create a trustworthy global fintech brand?</p> <p>Speakers: Ben Johnson, Partnerships Manager – Business Platform UK &amp; EMEA, Xero</p> <p style="text-align: right;">Sponsored by </p>
<p>Monday 30 – Tuesday 1 <b>Mortgages</b></p> <p><b>E</b></p>	<p><b>Mortgages Summit 2019</b></p> <p>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. This invitation-only event will start with the opening address and discussion at midday on Monday 30 September and the agenda will combine keynote presentations and break-out group discussions until the afternoon of Tuesday 1 October.</p> <p style="text-align: right;">Sponsored by</p> <p style="text-align: center;">      </p>
<p>Thursday 3 <b>Private Banking &amp; Wealth Management</b></p> <p><b>E</b></p>	<p><b>What Should the Investment Industry Do About Its Reputational Crisis?</b> A Roundtable For Private Banks and Wealth Managers On Managing Reputation</p> <p>The investment industry, including private banks and wealth managers, is facing a reputational crisis. Regulatory and political scepticism is on the rise, and the industry now grapples with the uncertainty following the Woodford meltdown. In this session, Tony Langham, Chief Executive of Lansons and author of "Reputation Management" (Emerald Publishing, 2019) will lead a discussion on how the industry might respond to this crisis.</p> <p style="text-align: right;">Sponsored by </p>
<p>Sunday 6 – Tuesday 8 <b>General</b></p> <p><b>E</b></p>	<p><b>Executive Summit 2019</b></p> <p>Our annual Executive Summit provides a unique opportunity for Executive Members and select guests to focus on strategic issues in financial services marketing. The agenda will combine keynote presentations and break-out group discussions, and engage delegate in the issues that matter most to their business. This <b>invitation only</b> event will this year focus on the changing needs of the customer. We will consider the key economic, behavioural, technological and generational forces that are driving change, looking at three-time horizons: the next 12 months, 1-3 years and 10 years. How is consumer behaviour changing? And how can financial services understand changing habits, and ensure they remain relevant now and for the long term with the right products, delivered to the right audience, at the right time?</p> <p style="text-align: right;">Sponsored by</p> <p style="text-align: center;">     </p>
<p>Tuesday 15 <b>Brand Strategy</b></p> <p><b>E A P</b></p>	<p><b>Free Advertising: Do you get what you pay for?</b></p> <p>For countless financial start-ups, big-ticket, big-budget advertising simply isn't an option. But no problem: surely these days you can build brands and recruit customers just as well, if not better, with lovely low-cost (or even no-cost) social? Well, maybe – but leading fintechs like Monzo and Nutmeg are turning up on paid-for TV, and they're probably not just aiming to use up surplus cash. Come along to this event and find out what you can expect – and what you can't – from no-cost/low-cost digital marketing.</p> <p>Speakers to be announced. Guest chair: Julian Camp, Brand &amp; Marketing Consultant</p>
<p>Thursday 17 <b>General Insurance</b></p> <p><b>E</b></p>	<p><b>Regain the Brand</b></p> <p>The fastest growing insurance companies are all relatively unknown brands, with their growth fuelled by price comparison websites. Without the brand heritage of the likes of Direct Line and Aviva, can an insurer afford to invest in brand? Are insurers better off partnering with distributors and tech firms, and focusing on managing the insurance risk? How can a firm raise its brand awareness above the noise of the price comparison websites?</p>

<p>Wednesday 6 <b>General</b></p> <p><b>E A P</b></p>	<p><b>Autumn Members' Conference – Trends, Opportunities and Challenges for Today's Senior Marketer</b></p> <p>A recent survey among members of The Financial Services Forum has found that creating differentiation, proving effectiveness and making the most of the technology opportunity are among the key challenges keeping senior financial services marketing professionals awake at night. This conference will take the main findings of the report to set our agenda for the morning and with our expert speakers and commentators, delve into the content. We will discuss the issues, look at the latest trends in marketing channels, skill and cultural challenges.</p> <p>Speakers: Rachel Besenyei, Head of Business Growth &amp; Social Media, BrandContent; Alex Murphy, Head of Marketing, Admiral. <i>More speakers to be confirmed.</i></p>
<p>Tuesday 12 <b>Retail Banking</b></p> <p><b>E</b></p>	<p><b>Consumer Banking: Are we at a Tipping Point?</b></p> <p>With the “quiet revolution” of open banking nearly two years old and with the continuing ebb and flow of challengers, our half-day event takes stock of the competitive landscape in retail banking and savings. We bring together expert industry voices to dissect and discuss the latest competitive trends in a half-day banking and savings event.</p> <p style="text-align: right;">Sponsored by</p> 
<p>Thursday 14 <b>General</b></p> <p><b>E A P</b></p>	<p><b>From Understanding Customer Needs to Understanding Their Personality</b></p> <p>We often focus on better understanding the customer by targeting their needs based on identifiable habits. But what about understanding their personalities? Richer profiling opportunities open up new ways to segment clients by personality. This session will consider how marketers can analyse psychological, personal and social factors to better understand attitude, perception, lifestyle and beliefs.</p> <p>Speakers: Dr Alex Chase, Head of Product, Oxford Risk. <i>More speakers to be confirmed.</i></p>
<p>Thursday 21 <b>General</b></p> <p><b>E A P</b></p>	<p><b>Annual Members' Dinner &amp; Marketing Effectiveness Awards 2019</b></p> <p>A wonderful chance to meet Members, entertain colleagues or clients, and celebrate success in our Awards for Marketing Effectiveness. One of the highlights of The Forum's calendar, this black-tie event provides a rare opportunity to experience one of London's most exclusive and prestigious venues – the City of London Guildhall. For sponsorship opportunities, please contact Malcolm Dunn via <a href="mailto:md@theforum.co.uk">md@theforum.co.uk</a></p> 
<p>Tuesday 26 <b>Fintech</b></p> <p><b>E</b></p>	<p><b>The Race to Primary Banking Relationship Status</b></p> <p>After over a decade of investment and growth, the UK has become an internationally recognised centre of fintech excellence with an enviable record of nurturing fintech banks. Yet the reality is that few of the new fintech providers have secured primary banking relationship status with their customers and the traditional banks still dominate. In this session, we will hear from leading fintech banks as well as the digitally enabled established players. What's holding fintechs back and are the fintech banks in danger of being nice extras rather than the main event?</p> <p style="text-align: right;">Sponsored by</p> 
<p>Thursday 28 <b>Asset Management</b></p> <p><b>E</b></p>	<p><b>Does Creative Really Matter?</b></p> <p>Asset management isn't a sector known for brilliant advertising. But with many investment houses pumping out virtually indistinguishable content, could better creative be a real differentiator? Our panel of creative experts discuss the good and bad in advertising and branding. We will also look at the best way to work with external agencies, including how you can ensure a good fit and have room for challenging and distinctive creative work.</p> <p>Speakers: Lucian Camp, Brand and Marketing Consultant; Ian Henderson, Chief Executive Officer, AML Group</p> <p style="text-align: right;">Sponsored by</p> 

Tuesday 3  
Mortgages

E

## Mortgages Forum: Trust in Financial Institutions – an Oxford Union Debate

The breakdown in trust following the crash has been followed by a period of institutions endeavouring to regain public trust. At the same time, new entrants, unencumbered by legacy, have entered the market and built strong followings. What will the future hold? Our expert speakers will set out their opposing positions, ahead of a debate and questions from the floor.

Speakers: Jackie Bennett, Director of Mortgages, UK Finance, Lynda Blackwell, Former Mortgage Manager, FCA. Chair: Stephen Smith, former Director of Housing Strategy, Legal & General

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Brain

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General  
Surveying Services



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Thursday 5  
Corporate  
Communications

E A P

## Corporate Communications Event

Steered by Lansons Chairman Tony Langham, our panel of expert of expert commentators will discuss key issues and all the topical challenges facing corporate communications professionals working in the FS sector.

Tuesday 10  
Life & Pensions

E

## ESG and Pensions: Marketing Positive or Unwanted Burden?

With regulators showing increased interest in Environmental, Social and Governance (ESG) factors being integrated into pension investment, what are the marketing implications? Should pension providers see ESG as a marketing positive, or an investment distraction and regulatory burden? Do customers care about ESG – do they even understand it, and will they pay more for funds incorporating these factors? Our expert panel looks at the latest responsible investing trend.

Thursday 12  
Digital & Direct  
Marketing

E A P

## Voice Search Marketing for Financial Services

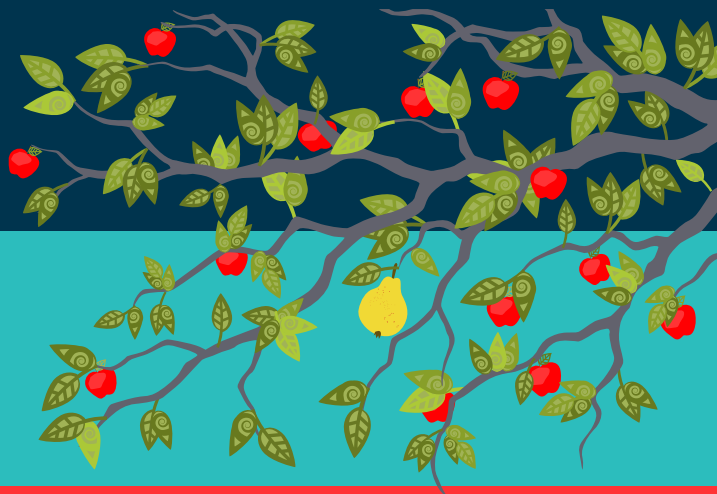
It is estimated that between 30% and 50% of searches will be voice activated by the end of 2020. If you have a digital marketing strategy, then voice search will have a direct effect on this and inevitably affect your business. Whether or not this will bring positive or negative results depends on how well you adapt your strategy to the changing landscape. Voice search improves the user experience of search engines and if your website content is optimized effectively, your business could be the first could be the first a digital personal assistant suggests.

# 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@theforum.co.uk](mailto:lh@theforum.co.uk).



To view our latest edition of *Argent*, visit [theforum.turtl.co/story/summerargent2019](https://theforum.turtl.co/story/summerargent2019)

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