

P2F: Digital Transformation & Innovation Conference 2021

08.30 Log In & Explore The Virtual Platform

08.40 GIC Welcome

08.50 Morning Chair's Welcome & Opening Remarks

David Thomson
Senior Product Owner
Lloyds Banking Group

CUSTOMER TRENDS, EXPECTATIONS & JOURNEYS

09.00 Add Real Value & Deliver Seamless & Innovative Customer Journeys & Experiences Based On Today's Changed Customer Trends & Expectations

- Declutter your onboarding processes to deliver instant sign-ups and new products at the touch of a button
- How can you gain a more holistic view of the customer journey and tap into customer demand, expectations and trends around digital transformation?
- How far is too far for your customers?
- Where can flexible processes enhance customer experience and ensure completion by allowing customers to dip in and out of product journeys?
- Strategies to navigate data security requirements to offer hassle-free customer journeys when customer patience is running out
- Customer rich but data poor: increase customer data capture during journeys without breaking the bank
- Increase app adoption as not just an add on but an essential part of new product journeys

Mercedes Clark Smith
Head of Design and Validation Retail Experience
National Savings & Investments

AI VALUE & BENEFITS PANEL

09.20 Look Past The Buzz To Discover The True Value Of AI & Real-Life Applications That Enhance Customer & Colleague Experience

- How can you apply AI in its simplest forms to financial services to fully leverage its value for customers and colleagues?
- Navigate the limits of legacy systems to find new partners and AI solutions that boost innovation and fit your digital needs
- Evaluate and action the right amount of AI and RPA for your processes, what are the opportunities and where are we going too far?

- Hanging-up and switching-off: how can we retain a human element to produce intuitive chatbots that guarantee interaction and customer uptake?
- Watch the bottom line: quantify and measure the value and benefits of AI to win buy-in and convert sceptics

Shnay Chohan
Senior AI Product Manager
NatWest Group

Pierre du Rostu
Head of Innovation
AXA XL

Sarah Greasley
Chief Technology Officer, Architecture CoE Lead
Direct Line Group

Matthew Weil
Head of Product
VoiceSage

WINNING CUSTOMER COMMITMENT THROUGH AMAZING EXPERIENCES

09.50 **Join Quantum Metric, winner of the Finovate UK 'best of show' for 2021, as the company shows the key ways FS&I businesses can improve the digital experiences they're giving customers and become more customer centric in their digital development, including:**

- Proactively identify how to improve their digital offerings
- Making sure customer feedback and service centre operations are seamlessly incorporated into digital improvement
- Ensuring native apps are running as smoothly as possible and customers are using them as intended.
- Understanding the complete customer journey across digital products, and knowing where and why it can be improved

Negin Rostasalehi
Senior Solution Engineer
Quantum Metric

Mike Parfitt
Director of Account Management
Quantum Metric

10.10 Morning Coffee Break & Informal Networking

TRANSFORMATION CHOREOGRAPHY, METHODOLOGIES & LEGACY

10.40 From Paper To People, What Are The Best-Practice Methodologies For Strategically Upgrading Legacy Systems & Practices To Implement Digital Transformation Agilely?

- Discover how to choreograph digital transformation for sustainable, valuable, and long-lasting change
- Resistance, doubt and fear: how can you secure buy-in from colleagues and senior management for a frictionless transformation?
- Leverage transformation choreography to not only prepare for the future but transform the present
- Balance innovative transformation with restrictive regulations and real-life capabilities
- Learning from agile, speedy fintechs whilst navigating legacy and governance restrictions

10.40

Sol Enenmoh

Head of Digital Transformation

Vanquis Bank

11.00

Bhavik Mohandas

Director of Product Management

American Express

11:20 Streamline Account Opening & Onboarding In Financial Services

In this session we will explore:

- Changing landscape in Financial Services and the new challenges they face.
- How DocuSign can help digitise and streamline the account opening process.
- Learn how companies such as Santander have leveraged DocuSign's technology in order to provide a fully digital account onboarding.

Stephanie Liais

Senior Product Marketing Manager

DocuSign

William Jenkins

Major Account Executive - Financial Services

DocuSign

Liam Coates

Senior Solutions Architect

DocuSign

Stephen Baron

Performance Development Manager

Nationwide Building Society

David Champion

eCommerce Manager

Nationwide Building Society

CULTURAL TRANSFORMATION

11.35 Overcome Colleague Hesitancy Around Change, Innovation And Digitisation To Achieve Business-As-Usual In A Post-Pandemic World And Spark New Ways Of Working For 2022 And Beyond

- Define and embed digital transformation strategies that complement your company culture
- Steps to secure stakeholder buy-in and create change champions to achieve long-term, sustainable cultural and digital transformation
- How do you measure the success and value-add of cultural transformation and change in digital environments?
- Power the future: how can you ensure your company culture attracts a skilled workforce capable of realising digital innovation?

Christopher Williamson
Head of Delivery
first direct

OPEN BANKING

11.55 The World's Your Data-Oyster, But How Can We Leverage Greater Connectivity To Harness The True Value Of Open Banking For Companies & Customers?

- Don't get left behind: apply the potential of open banking and API within the constraints of historic and legacy systems to improve customer experience
- Beyond PSD2, how do we successfully navigate data ethics when delivering open banking strategies and products?
- One-stop-shop or shopping around? Dig deeper into customer and client expectations to understand perceived roles of banks in the future and the consumer demand for open banking
- How can you educate customer and clients of the value of open banking to kick-start their open banking journey and guide them along the way?

Jonathan Holman
Head of Digital
Santander Corporate & Commercial

12.15 BONUS SESSION – HARRIS INTERACTIVE

Times Are Changing & The Way Consumers Manage Their Finances Is Increasingly Digitalised, & This Has Accelerated Since The Start Of The Pandemic. What Does The Future Hold?

- What is consumers' current activity and attitudes towards managing personal finances online?
- Has this changed by the unique environment of the past year or so?
- What will the impact of this be? Will how consumers manage finances revert when 'normality' returns?

Mark Foran
Associate Director Financial Services
Harris Interactive

DIGITAL & APP DESIGN & USABILITY

12.30 Overcome Reduced Customer Loyalty With User-Centred Products & Apps Which Reduce Friction & Boost Engagement

- Does what it says on the tin: customer-insight-driven design which prioritises simplicity and clarity for user-friendly journeys from start to finish
- Maximise design and app aesthetics to win and maintain customer loyalty in dense, competitive marketplaces where unique designs differentiate similar solutions
- Sleek and simple but underused: how can you drive adoption amongst your customers to make app-use a repeat and engrained behaviour?
- When patience is thin and speed is key, help your customers find the information they need quickly and efficiently on websites and apps
- With the mobile market divided between Apple and Android, adopt measures to improve app integration to enhance user experience and deliver a seamless experience

12.30
Richard Beaumont
Director of Design
Direct Line Group

12.50
Srivigneshwar Prasad
Senior Product Designer
Portify

13.10 Morning Chair's Closing Remarks

13.15 Lunch Break & Informal Networking

13.15 Informal Breakout Discussions

A) Digital Inclusion

Sol Enemoh
Head of Digital Transformation
Vanquis Bank

B) Sustainability

Lydia Malakis
Senior Advisor
Gossmann & CIE Group

C) Future Of Advice

Paul Selman
Senior Digital Product Owner

M&G

14.15 Afternoon Chair's Opening Remarks

David Thomson
Senior Product Owner
Lloyds Banking Group

DATA STRATEGIES

14.20 From Data Lakes To Data Deserts: Collect, Harness & Leverage Data To Power Your Digital Transformation & Innovation

- How can you navigate regulations to harness GDPR-compliant data that boosts your digital innovation and proves the value-add of your transformation strategies?
- Quality and quantity: unlock meaningful insight from your data to streamline transformation and support change
- Compliantly and efficiently collect customer data throughout product journeys to harness their voice and complement your metrics
- Navigate the advantages and risk of Cloud storage and the best option for your data today
- Overcome the security barriers of accessing sensitive data whilst working from home to enable your remote teams to continue with business-as-usual

Eddie Yanez
Head of Digital and AI Strategy
AIG

14.40 THE DEVELOPER EXPERIENCE IN FINANCIAL SERVICES

In Today's Age, Financial Services Companies Are Having To Transform Into Tech Companies. Developers Are The New Rock Stars Of Banking. But What Does This Mean For Your Business?

- How can you keep up with this trend?
- How are developers needs different from other financial services roles?
- How can you leverage user research to improve the developer experience?

Lisa Fraser
Executive Director (VP) UX Research
Goldman Sachs

Lorisa Dubuc
Executive Director (VP) Head of User Research
Goldman Sachs

15.00 Bonus Session Reserved For Exclusive Conference Partner – Dreams

Henrik Rosvall
Founder & CEO
Dreams

NATWEST DIGITAL TRANSFORMATION CASE STUDY

15.15 Discover How NatWest Are Leading The Way In Financial Services By Harnessing Digital Technology To Drive Climate Transformation

- Hear from the only financial sponsor of COP26 – what does their climate change roadmap look like and what are their hopes for the future?
- Decarbonised data: explore the future of data centres and how financial services can be key players in this journey
- Going green, what are the implications of greener coding practices and how will this revolutionise digital transformation and innovation within FS?
- Seismic shifts and mindset makeovers: how digital technology and customer experience can power greener habits and enable fundamental changes in Financial Services to help them become responsible stewards of a global ecosystem

Kari-Anne Clayton
Head of Transformation & Strategy - Retail Banking Digital & Technology
NatWest

15.35 Afternoon Refreshment Break With Informal Networking

BUILD FINANCIAL CAPABILITY & BRIDGE THE DIGITAL DIVIDE

16.05 From Profit Priorities To A Customer-Centric Conscience: The Role Of Financial Services In Promoting Financial Capability, Furthering Digital & Financial Literacy & Reducing Digital Divisions

- With Covid-19 accelerating digital inequalities, find solutions for customers limited by digital ability, mobile data allowances, smartphone capabilities and a lack of digital devices
- How are you digitising customer journeys and applications to make them increasingly accessible to your most vulnerable customers?
- Break taboos and build trust: how can digital technologies be harnessed to encourage customers to address their financial wellbeing?
- From mortgages to pensions to savings and investments... proactively build financial literacy and capability to educate and empower your customers
- Proactive, preventive innovations and early intervention tools to save your customers from falling into financial hardship

Kat Mann

Savings & Investment Specialist

Nutmeg

Mercedes Clark Smith

Head of Design and Validation Retail Experience

National Savings & Investments

Ullas Kishore

Senior Manager, Transformation Strategy

Lloyds Banking Group

Paul Selman

Senior Digital Product Owner

M&G

Carl Spilker

EVP of Analytics & Advisory

GDS Link

CUSTOMER TRENDS, EXPECTATIONS & JOURNEYS

16.35 Add Real Value & Deliver Seamless & Innovative Customer Journeys & Experiences Based On Today's Changed Customer Trends & Expectations

Paul Selman

Senior Digital Product Owner

M&G

THE FUTURE OF WORK, CHALLENGER BANKS & DISRUPTORS

16.55 Innovate & Overcome The New Challenges In A Digital-First World As We Move Towards Post-Pandemic "Business As Usual"

- The end of physical branches? Explore the Covid-powered customer behaviours that are here to stay and those that will fade
- How has Covid-19 accelerated workplace digital transformation as 5 year plans vanished overnight?
- What are the new opportunities which have emerged from a period of disruption and how can we implement them for sustained innovation?
- From deskless to hotdesking and hybrid, discover how to adapt work environments to get the best out of your workforce and measure output wherever they are
- Watch the gap: navigate the pending digital skill shortage to empower your workforce, maintain efficiency and power innovation
- With increasing digital scams and security vulnerabilities, how can you navigate data and privacy regulations to offer a viable working from home experience?

Christopher Williamson

Head of Delivery
first direct

Bhavik Mohandas
Director of Product Management
American Express

17.25 Afternoon Chair's Closing Remarks & Official Close Of Conference